

# **Educator Development and Support (EDS) Project**

## **Final Report**

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FOR THE

**JOINT EDUCATION TRUST**

AND FOR THE

**TEACHER DEVELOPMENT CENTRE**

OF THE

**DEPARTMENT OF EDUCATION**

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# NOTE TO THE READER

If you are working with the hyperlinked version of this report, you can left-click at various points where you see a highlighted reference, for example [Chapter One](#) or the [general findings](#) in Chapter Six. This will take you either to a point within this document, or it will open another project document such as one of the case studies (for example, [Case 1](#)).

Wherever the hyperlink takes you, you can return instantly to where you were reading by left-clicking the 'back' arrow on your web toolbar.

If your toolbar is not visible, select 'View' followed by 'Toolbars', and tick the 'Web' bar. If you don't want this facility permanently on your screen, repeat this operation and deselect the 'Web' bar.

In order to use this facility, all of the relevant files must be saved in the same folder (directory) without changing the filenames. If you have received the CD-ROM version, they may be simply kept on the CD. Please make sure that you always open this file ('Final Report') first.

This facility is especially useful if you would like to get an overview of the whole project, including the case studies, or if you would like to 'skip' from the overarching findings of Chapter Nine back to the relevant findings of Chapters Six and Eight, to get a more complete sense of how the Chapter Nine recommendations were derived. At the end of each Chapter Nine recommendation this facility is offered.

I hope you find this report, and its electronic version, useful.

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# PREFACE

The Educator Development and Support (EDS) Project is a project of the Teacher Development Centre of the Department of Education, managed by the Joint Education Trust (JET) and funded by DANIDA. The Project was carried out between November 1998 and April 1999 by the EDS Project Consortium, which comprised:

- ❑ the Centre for Education Policy Development;
- ❑ EduSource (Education Foundation);
- ❑ Paul Musker and Associates;
- ❑ the South African Institute for Distance Education;
- ❑ the University of Fort Hare Education Policy Unit;
- ❑ the University of Natal (Pietermaritzburg) Department of Education; and
- ❑ the University of the Witwatersrand Education Policy Unit.

The Consortium was managed by [Paul Musker and Associates](#).

The purpose of the project was to contribute to the EDS standards-generating process in the Schooling subfield of the Education, Training and Development field. Through ten case studies of EDS programmes, of which this is one, we have tried to record current understandings of and practices in EDS, to examine these in the light of the recommendations offered in the *Norms and Standards for Educators* report and other key policy initiatives, and to understand through the research activity:

- ❑ how the EDS standards-generating process can be further developed;
- ❑ how, in general rather than programme-specific terms, the design of EDS programmes can be improved; and
- ❑ how the *Norms and Standards for Educators* report (Department of Education, 1998) can be refined and further elaborated.

The ten case studies were:

- [Case 1.doc](#): The Further Diploma in Education (Educational Management) Programme of the University of Pretoria and Success College;
- [Case 2.doc](#): The Imbewu Project;
- [Case 3.doc](#): The Higher Diploma in Education of the University of Cape Town;
- [Case 4.doc](#): The Higher Diploma in Education (Junior Primary) of the South African College for Teacher Education;
- [Case 5.doc](#): The Further Diploma in Education (Development, Management and Administration) of the University of the Witwatersrand;
- [Case 6.doc](#): The Primary Science Programme;
- [Case 7.doc](#): The Mathematics, Science and Technology Education College;
- [Case 8.doc](#): The University of Fort Hare Distance Education Project;
- [Case 9.doc](#): The Bachelor of Education Programme of the University of Natal in Pietermaritzburg; and
- [Case 10.doc](#): The Assessment, Education and Training Unit of the Independent Examinations Board.

In this Final Report of the EDS Project, these case studies are analysed, and overall project findings and recommendations are presented.

# EXECUTIVE SUMMARY

The Educator Development and Support (EDS) Project, commissioned by the Teacher Development Centre of the Department of Education and managed by the Joint Education Trust and funded by DANIDA, was carried out between November 1998 and April 1999 by a research consortium comprising seven organisations. The purpose of the research was to improve our understanding of:

- ❑ *how the EDS standards-generating process can be further developed;*
- ❑ *how, in general rather than programme-specific terms, the design of EDS programmes can be improved; and*
- ❑ *how the Norms and Standards for Educators report can be refined and further elaborated.*

After two pilot studies which served to refine the research instruments, ten diverse and purposively sampled case studies of EDS programmes gave a rich description of a broad spread of EDS practices in South Africa, in qualification-bearing and non-qualification programmes, as well as in different types of institutional setting, including consortia and partnerships.

The *Norms and Standards for Educators* (NSE) report (Department of Education, 1998) was in a sense the central ‘case study’, since the convergence between the proposals of the NSE report and on-the-ground realities became more an object of scrutiny than the programmes themselves. The programmes were not evaluated, and therefore more objective information has been gathered and analysed about the policy process than about the state of EDS provision. Nevertheless, important lessons have been learned about EDS practices in terms of educator competences and roles, the assessment of applied competence, the development of specialist educators, the integration of theory and practice, relationships between providers and schools, professionalism, programme design and quality assurance – the key features which underpin the NSE report. The [overarching findings and recommendations](#) which are presented in Chapter Nine, however, are related to challenges of policy and implementation which are, at least partially, within the scope of the Department of Education to address.

[Chapter One](#) gives a brief background to the Project. In [Chapter Two](#), the research methodology is described. [Chapter Three](#) sets out the key conceptual issues which formed the basis for the design of research instruments. (A [Literature Review](#) is attached as a separate document.) In [Chapter Four](#), summaries are presented of each of the ten EDS programmes which constituted the case studies. [Chapter Five](#) presents the cross-case analysis of convergence with the NSE report; [Chapter Six](#) presents forty-five specific findings and fifteen general findings emanating from the convergence analysis. [Chapter Seven](#) presents the cross-case analysis of critiques of the NSE report; [Chapter Eight](#) presents twenty-five findings based on this analysis. Finally, [Chapter Nine](#) presents eighteen [overarching findings and recommendations](#) which are closely based on the findings of Chapters Six and Eight. Finally, [Annexure A](#) contains the research sample; [Annexure B](#) contains the research instruments.



# CHAPTER ONE

## INTRODUCTION AND PROJECT PURPOSE

This research report presents the cross-case analysis of ten case studies (see Annexure A) of South African Educator Development and Support (EDS) programmes, together with overall project findings and recommendations.

The EDS Project was commissioned by the Teacher Development Centre of the Department of Education to a project consortium comprising seven institutions and organisations (see Preface) and led by Paul Musker and Associates. The Project was managed by the Joint Education Trust, and funded by DANIDA.

The rationale for the Project resides in the current policy context in which EDS programmes operate in South Africa. Various policy processes had culminated by 1998 in key documents affecting educator development, either directly or indirectly, in historically significant ways. These are:

- ❑ the *Norms and Standards for Educators* report;
- ❑ the *Duties and Responsibilities of Educators* agreement;
- ❑ the *Code of Conduct* of the South African Council of Educators; and
- ❑ the *Developmental Appraisal Manual*.

The first of these documents most obviously and directly impinges on the work of educator development providers, whether they deliver pre- or in-service programmes. Taken as a whole, however, the four documents constitute an array of symbolic, procedural and regulatory instruments which are intended to transform EDS practice, and more generally to contribute to a process of education transformation based on equity, redress and justice.

The concern of the Department of Education was to ascertain the convergence between this policy thrust, in particular the proposals of the *Norms and Standards for Educators* report, and current realities of EDS provision. This ‘convergence’ analysis was intended to be balanced and bidirectional, in the sense that the feasibility of the policy proposals was as much an object of scrutiny as the EDS programmes selected as case studies. It was not, therefore, the intention of the Project to ascertain the extent to which the selected programmes ‘matched up’ to proposed requirements in the *Norms and Standards for Educators* report. The project purpose, as defined by the Department of Education in consultation with Reference Group members, makes this clear:

The purpose of this project is ... not to evaluate particular programmes, but to contribute to the EDS standard-generating process. No evaluative judgments will be made with regard to any particular programme in terms of its delivery strategy or its impact. It is assumed that, formally or informally, EDS programme implementers are beginning a process of reflection to establish their understanding of and response to the *Norms and Standards for Educators* report, and to adapt their programmes accordingly. The project is therefore an attempt to record the current understandings and practice of EDS, to examine these in the light of the recommendations offered in the *Norms and Standards for Educators* report and other key policy initiatives, and to understand through the research activity:

- ❑ *how the EDS standards-generating process can be further developed;*
- ❑ *how, in general rather than programme-specific terms, the design of EDS programmes can be improved; and*
- ❑ *how the Norms and Standards for Educators report can be refined and further elaborated.*

# CHAPTER TWO

## METHODOLOGY

### BROAD RESEARCH APPROACH

The broad research approach followed was qualitative. The purpose of the research instruments used in each of the ten case studies (see Annexure B) was to facilitate:

*Case study analysis of ten EDS programmes, in terms of:*

- *programme team descriptions and perceptions of the programme;*
- *programme documents; and*
- *intra-institutional dialogue.*

*This analysis will include, in broad terms:*

- *programme goals;*
- *target groups of learners;*
- *purpose of qualification or potential qualification;*
- *design and structure of the qualification or potential qualification;*
- *curriculum (materials, activities) of the programme;*
- *delivery modes;*
- *assessment practices;*
- *learner support systems; and*
- *quality assurance.*

The research approach and instruments were designed collaboratively with the majority of the case study researchers and other advisers from the consortium organisations. Three researchers were recruited at a later stage and fully briefed through orientation sessions and telephonic support.

The broad research approach was characterised by three ‘waves’ of activity:

In the **first wave** of research activity, each programme team was given the fullest possible opportunity to describe the programme through oral reporting (group interviews 1 and 2) and by providing relevant documentation. This wave of activity encompasses Phases 1 to 5 below. A key feature of this work is that it was not rooted in the *Norms and Standards for Educators* report, either conceptually or in terminology. Rather, each researcher adopted a traditional case study approach to data collection, which generated a complete and accurate description of the programme. The description also recorded the context in which the programme is delivered.

In the **second wave** (Phase 6), the researcher probed the programme team’s perceptions of the *Norms and Standards for Educators* report. This marked the end of the fieldwork.

In the **third wave** of activity, each researcher generated two forms of analysis (‘convergence’ analysis, and critique of the *Norms and Standards for Educators* report), as well as findings and conclusions. This was desktop work based on the data gathered during the fieldwork, and encompassed Phases 7 to 9 of the research activity.

The three waves of research activity, and their relevant phases, are described in more detail below.

## PHASES OF RESEARCH ACTIVITY

- 1 Phase 1** comprised an initial brief meeting with each EDS programme team which was intended to be relationship-building and purpose-clarifying rather than a research-oriented event (see Instrument 6.1 in the Researcher's Manual, Annexure B). The list of participants who attended the meeting was discussed in advance with the programme coordinator, but included at least all key programme team members. All relevant documentation for Phase 3 was requested at this meeting and obtained as soon as possible afterwards. A letter from the Teacher Development Centre (see Document 3 in the Researcher's Manual, Annexure B) was sent to the provider to facilitate the organisation of this opening event and the case study in general.
- 2 Phase 2** comprised one group interview (see Instrument 6.2, Annexure B) with key programme team members. The core, generic interview questions set out in Instrument 6.2 were complemented by the documentary review conducted in Phase 3. This first group interview was conducted before the review of documentation began, unless special circumstances dictated otherwise.
- 3** A review of all programme documents (see Instrument 6.2, Annexure B) constituted **Phase 3** of each case study. This review contributed to the description of the programme's intentions with regard to the key facets of the programme. In the course of the Phase 3 review further interviews were conducted telephonically when necessary with the relevant member(s) of the programme team to clarify or expand on the programme documentation. Researchers thus ensured that they were in possession of enough useful data to inform the programme description (Part Three of the Case Study Report – see Section 2 of Instrument 6.2, Annexure B).
- 4 Phase 4** entailed the generation of **Parts One, Two and Three** of the Case Study Report ('Introduction', 'Methodology' and 'Description of the Programme'), on the basis of Phases 2 and 3 above. Part Three followed the headings set out in Instrument 6.2 (Annexure B). The programme team was given the fullest possible opportunity to present relevant data as a basis for the programme description, as well as the context in which the programme is delivered.
- 5 Phase 5** comprised a second group interview (see Instrument 6.2, Annexure B). This interview provided an opportunity to present the programme description produced by the researchers in Phase 4, and to check with the programme team the completeness and accuracy of this description. To facilitate the discussion, a reasonable opportunity was given, either before or after the group interview, for the programme team to interact with and comment on the researcher's description. The description was amended on the basis of evidence presented in this interaction with the programme team. At this stage, researchers also had an opportunity to ensure that they had sufficient data to inform the analysis sections (Parts Four and Five of the Case Study Reports – see Instruments 6.4 and 6.5, Annexure B).
- 6 Phase 6** consisted of a third group interview (see Instrument 6.3, Annexure B) which marked the end of the fieldwork. At this meeting, each researcher facilitated a discussion of the programme team's perceptions of the *Norms and Standards for Educators* report. The outcomes of this group interview were included in Part Five of each Case Study Report (see below).
- 7 Phase 7** entailed the generation of **Part Four** of the Case Study Report, which constitutes an analysis (see Instrument 6.4, Annexure B) of the Phase 3 programme description. Each programme was analysed in terms of the *Norms and Standards for Educators* report. In this first stage of the analysis, which we refer to as the 'convergence' analysis, the *Norms and Standards for Educators* report was used as a basis for examining similarities, differences and tensions in the identified characteristics of the programme with respect to the

recommendations of the report. The context in which the programme is delivered are a key feature of this analysis.

- 8 In **Phase 8**, the *Norms and Standards for Educators* report was analysed in terms of the outputs of Phases 4 (programme description), 5 (second group interview checking the programme description), 6 (final group interview investigating perceptions of the *Norms and Standards for Educators* report) and 7 (analysis of the programme description). In this second stage of the analysis the focus was reversed, and the key recommendations of the *Norms and Standards for Educators* report itself (see Instrument 6.5, Annexure B) were scrutinised. The output comprised **Part Five** of each Case Study Report.
- 9 In **Phase 9**, Findings and Conclusions (**Part Six** of each Case Study Report) were presented on the basis of the two-way analysis described above in Phases 7 and 8, as well as the Phase 6 Group Interview (the final group interview).

## OVERVIEW OF PHASES OF RESEARCH ACTIVITY

A tabular overview of the research activity is presented below.

Wave	Phase	Activity/Purpose	Output	Relevant research instrument (see Annexure B)
1 Field and desktop	1	Establish a relationship with the programme team and clarify purpose and nature of research	Common understanding	6.1
	2	Conduct Group Interview 1 with the programme team to give the team the fullest possible opportunity to describe the programme	Verbal programme description and relevant documentation	6.2
	3	Review programme documentation and consult telephonically with programme team to clarify issues where necessary	Clear understanding of programme	6.2
	4	Describe the programme	Parts One and Two, and draft Part Three, of the Case Study Report	6.2
	5	Conduct Group Interview 2 with the programme team to give the team the fullest possible opportunity to review the description and present further evidence to ensure completeness and accuracy	Final version of programme description (Part Three of Case Study Report)	6.2
2 Field	6	Conduct Group Interview 3 with the programme team to discuss the programme team's perceptions of the <i>Norms and Standards for Educators</i> report	Input for Part Five of the Case Study Report	6.3

3 Desktop	7	Conduct 'convergence' analysis using the <i>Norms and Standards for Educators</i> report as a basis for examining similarities, differences and tensions in the identified characteristics of the programme with respect to the recommendations of the report, taking into account the context(s) in which the programme is delivered	Part Four of the Case Study Report	6.4
	8	Conduct critical analysis of the <i>Norms and Standards for Educators</i> report in terms of the outputs of Phases 4 (programme description), 5 (second Group Interview checking the programme description), 6 (final Group Interview investigating perceptions of the <i>Norms and Standards for Educators</i> report) and 7 (analysis of the programme description)	Part Five of the Case Study Report	6.5
	9	Generate findings and conclusions	Part Six of the Case Study Report	Not applicable

## RESEARCH SAMPLE

The final research sample is attached as Annexure A. The sample was constructed through purposive sampling to obtain a cross-section of EDS programmes in terms of:

- ❑ the size of the programmes in terms of numbers of students, in order to incorporate both small- and large-scale programmes;
- ❑ qualification versus non-qualification programmes, including programmes which could in future be based on a unit standard or a set of unit standards rather than a whole qualification;
- ❑ purpose and target audience of programmes, and topics covered;
- ❑ the mode of delivery employed by the various programmes;
- ❑ rural as well as urban sites for delivery of EDS programmes; and
- ❑ the extent to which programmes operated on a partnership basis.

## RESEARCH PROTOCOLS

The following research protocols were followed:

- ❑ The research approach and instruments were piloted in two EDS programmes (see Annexure B), and the research instruments thoroughly reworked on the basis of the lessons learned during the pilot studies.
- ❑ All programme teams received a letter from the Department of Education and from Paul Musker and Associates to introduce the researcher(s) and to request co-operation. Programme teams were generally most helpful.
- ❑ A log of project activity, including dates, times and venues of meetings, interviews and observations, was kept and attached to each Case Study Report.

- ❑ Selected verbatim and paraphrased extracts from the interviews and programme documentation were included as integral elements of the main text to support the description and analysis.
- ❑ All relevant programme documents and cassettes were attached to the Case Study Reports.
- ❑ Research limitations encountered during fieldwork (and departures from the workplan) were recorded and included in Part Two of each Case Study Report.

## DATA ANALYSIS

Each case study presents a programme description based on agreed descriptive categories (see Instrument 6.2 in Annexure B). The programme data (gathered from oral as well as documentary sources) were then analysed by each case study researcher in terms of a framework of seven categories derived from the *Norms and Standards for Educators* report (see Chapter Three). The programme teams' critiques of the *Norms and Standards for Educators* report were then presented according to the same framework of categories, with other critiques recorded in addition to those which matched the prepared framework.

When the case studies were completed, the Project Manager compiled this report through a process of detailed analysis of the case studies as secondary data. The analysis of programmes in terms of the *Norms and Standards for Educators* report (see Chapters Five and Six) was performed using a slightly refined framework of nine categories, which nevertheless corresponded very closely with the seven set out in Chapter Three. The critiques of the *Norms and Standards for Educators* report were however analysed without using a predetermined framework of categories. In this case data items from the case studies were loaded into data tables (see Chapter Seven), and coded according to emerging categories of meaning. The coded data formed the basis for descriptive analysis (Chapter Seven) and the generation of findings (Chapter Eight). Two researchers, Paul Musker and Ben Parker, then worked closely together to generate an overall analysis, together with findings and recommendations (Chapter Nine).

## CONCLUSION

The key feature of this research approach is that a 'traditional' case study strategy was employed with a view to obtaining a 'thick' description of each programme. The description was then used to analyse both the programme and the *Norms and Standards for Educators* report. The research included a dialogical component characterised by interviews and workshops with each programme team. Generally, the research pursued a balanced, parallel examination of the programmes on the one hand and the *Norms and Standards for Educators* report (Department of Education, 1998) on the other.

# CHAPTER THREE

## KEY CONCEPTUAL SHIFTS UNDERPINNING THE *NORMS AND STANDARDS FOR EDUCATORS REPORT*

### INTRODUCTION

Dr Cleaver Ota of the University of Fort Hare Education Policy Unit produced a [literature review](#) (attached as a separate text) in January 1999 for discussion by the EDS Consortium. The literature review covered the *Norms and Standards for Educators* (Department of Education, 1998) as well as related documents such as the *Developmental Appraisal Manual*, the *Code of Conduct* of the South African Council of Educators, and the *Duties and Responsibilities of Educators*.

On the basis of this review, the core research team (comprising representatives of different consortium organisations) discussed the key issues in the policy documents over two days and arrived at a set of seven conceptual shifts which underpin the *Norms and Standards for Educators* report. These conceptual shifts with respect to dominant historical practice in EDS then formed the basis for the design of the various instruments which addressed the critique of the proposed policy (see Annexure B). The seven shifts are presented below.

### OUTCOMES OF THE ANALYSIS OF THE LITERATURE

The *Norms and Standards for Educators* report contains seven key conceptual shifts in policy on educator development. The key shifts are:

1. **The *Norms and Standards for Educators* report suggests that the assessment practices of an EDS programme must be applied and integrated.**
  - A programme should assess whether learners are able to integrate (*horizontally*) the knowledge and skills delivered through the different courses/modules (and roles) which make up the teacher development programme.
  - A programme should assess whether learners are able to integrate (*vertically*):
    - ◆ the ability, in an authentic context, to consider a range of possibilities for action, make considered decisions about which possibility to follow, and to perform the chosen action (a practical competence);
    - ◆ the theoretical basis for and the knowledge which underpins and informs the action taken (foundational competence); and
    - ◆ the ability to connect decision-making and performance (practical competence) with understanding (foundational competence) and use this to adapt to change or unforeseen circumstances, to innovate within one's own practice, and to explain the reasons behind these innovations and adaptations (reflexive competence);so that they can be described as achieving an applied and integrated competence.
  - The assessment strategy should assess the extent to which learners have the ability *to teach in authentic and changing South African contexts*.

- ❑ Assessment should be *ongoing and developmental*.
- 2. The *Norms and Standards for Educators* report suggests that EDS programme practices must develop in teachers an applied and integrated teaching competence.**
- ❑ The teaching and learning strategy of a programme should develop both horizontal and vertical integration, as well as authentic application.
  - ❑ A programme should make links between the different courses/modules, and between different roles, which make up the teacher development programme.
- 3. The *Norms and Standards for Educators* report suggests that EDS programmes should develop teachers' 'subject knowledge' and 'phase knowledge' – the 'specialist role'.**
- ❑ Subject knowledge teaching should be an integral part of the rest of the programme, and should not be an 'add-on'. The contextual roles should be integrated into the 'subject knowledge' or 'specialist' role. Also, teaching observation should be integrated with content knowledge taught.
- 4. The *Norms and Standards for Educators* report suggests that programmes should be conceptualised and delivered in a manner which integrates theory and practice, and strengthens provider-workplace linkages.**
- ❑ A programme should work closely with schools in order to develop learner skills.
  - ❑ Teaching practice should be linked to the rest of the programme, and students should be well prepared for it. Teaching practice, again, should be integral to the programme and not an 'add-on'.
  - ❑ Training should be contextually sensitive.
- 5. The *Norms and Standards for Educators* report suggests that EDS programmes – and the programme ethos – should develop teachers as extended professionals and lifelong learners.**
- ❑ Learners, for example, might be involved in programme design and implementation, either formally (for example through decision-making structures) or informally (for example, by making decisions regarding the nature of their assignments).
  - ❑ Student-initiated activity (like involving themselves in tutoring schemes) might be recognised towards the qualification.
  - ❑ A programme should offer possibilities for ongoing professional development. To this end, delivery should be flexible enough to allow practising teachers to attend.
  - ❑ Assignments should be designed to encourage problem-solving within authentic contexts.
  - ❑ A programme should prioritise *and teach* critical engagement, reasoning and reflective thinking.



- ❑ A programme should ground teaching in a wider social, economic and political understanding and awareness.
  - ❑ Programme staff might be involved in policy-making and/or other social development activity outside of their mainstream activity.
  - ❑ A programme should develop an ethos which actively encourages lifelong learning and ongoing professional development. How does the institution handle recognition of prior learning (RPL)? Does the institution actively recruit in-service learners? (These may be discrete targeted courses, or the provider may have attempted to run courses that are flexible enough to accommodate both in-service and pre-service students on the same course.)
- 6. The *Norms and Standards for Educators* report suggests that EDS programme providers should demonstrate characteristics that are likely to make them a self-improving, a learning organisation.**
- ❑ An EDS provider should have a system of course and staff review.
  - ❑ An EDS provider should keep – and use purposefully - records of learners.
- 7. The *Norms and Standards for Educators* report suggests that an EDS provider should adopt inductive rather than deductive approaches to programme design.**
- ❑ An EDS programme should be designed on the basis of research, and some or all of this research should be conducted among target learners. Conversely, a programme should not be designed through a deductive ‘desktop’ exercise.

These seven conceptual shifts formed the basic framework for Part Five of each Case Study, in which each of the following five questions was applied to each of the seven conceptual shifts:

- 1** How is the shift understood by the programme team?
- 2** Is the shift perceived by the programme team to be a useful concept?
- 3** Is the shift perceived by the programme team to be desirable?
- 4** Is the shift feasible in the programme context?
- 5** Has the provider operationalised, or tried to operationalise, the shift in the programme, and if so how?

# **CHAPTER FOUR**

## **BACKGROUND TO THE EDS PROGRAMMES**

### **INTRODUCTION**

Given that the purpose of the EDS Project was informative and not evaluative, the ten case studies are presented below anonymously as Cases A to J.

### **CASE A**

The provider institution of Programme A is a non-government organisation comprising different teams focusing on various aspects of assessment-related activities. They offer training programmes across the country in formal education as well as in industry. The focus of their programmes is outcomes-based assessment. The training programme the providers chose to include in this research project was a nine-module course for the Northern Cape, designed, implemented and co-ordinated by an assessment unit within the provider institution.

Programme A was funded by USAID. It was delivered by the institution's assessment unit in partnership with the Northern Cape Department of Education. It was chosen for review because it most closely characterises a typical assessment training programme offered by the provider. It must be noted that the provider does not currently have a programme which it offers to every client, but rather structures each programme to suit the client's requirements and needs. This programme, although existing in another form, was specially structured in this way to meet the requirements of the Northern Cape Department of Education. The programme was conducted during 1997 in the Northern Cape Province, at venues in the immediate vicinity of Kimberley. The training took place on two levels. Level One training focused primarily on training facilitators who would be taking the training across the districts in the province. Level Two training, conducted by these trained facilitators, focused on training district officials, subject advisors and teachers.

The programme was designed for the target group of Foundation Phase subject advisors and teachers in practice. It was designed to take place over a period of time during which the participants would study modules grouped together in appropriate clusters and separated by periods of time during which participants returned to implement new practices in their classrooms. The programme included a variety of individual, paired and small group activities. The total time which participants spent in this programme directly in contact with the providers was approximately 32 hours.

The programme aimed to assist teachers with the radical paradigm shift from a normative and summative approach to a continuous assessment approach, as well as to assist teachers with developing new tools to aid the development of a new approach to assessment. While this course was not assessed in a standardised and formal manner, it was reported that informal and participatory assessment took place throughout the programme. Approximately 30% of participants from one district received post-training classroom support from the providers. All participants who actively participated in a course and attended all modular sessions were awarded certificates of attendance.

## **CASE B**

The provider institution of Programme B is a non-governmental, in-service education and training (INSET) programme. Formed in 1983 by the Urban Foundation, it first operated in the Western Cape and later spread its activities to KwaZulu-Natal and the Eastern Cape. In its early years, PSP consisted of a number of autonomous projects; however, since July 1993 it has become a consolidated national organisation. Its programmes now operate in all nine provinces, several of them running jointly with other non-governmental organisations (NGOs).

The mission of the provider institution is to give teachers the confidence and competence to teach primary science in which learners themselves become actively involved in their own learning. In this way, the programme hopes to promote enthusiasm for science and technology through classroom environments that encourage pupils to take control of their own learning and become effective learners, and in the final analysis, for teachers to help in the promotion of a more scientifically and technologically literate society.

In its initial stages, the provider institution was viewed essentially as a short-term project aimed at delivering science kits to schools and training teachers in the use of these kits. This was so particularly in the case of those provinces where it was implemented during 1983 to 1985 – Western Cape, Eastern Cape, KwaZulu-Natal and the Free State. In the course of school visits to KwaZulu-Natal in early 1985, it was discovered that the ‘kits and workshops’ strategy was not effective. These findings spurred the re-conceptualisation of the programme and started the long process of evolution into what it is today.

Teachers are now supported directly through workshops, and later in their classrooms. The Programme B approach revolves around kits of apparatus and teaching-learning materials designed for learner activity (see Appendix 2). Its holistic approach also means that competences such as language proficiency are consciously enhanced in the course of the training.

Generally, Programme B does not offer a formal qualification to teachers that take part in its activities. Teacher development in the South African context, especially for primary science, is viewed by the provider as a long-term development process. However, modules are contributed towards formal qualifications in one of its major projects.

Like many NGOs that have continued to function after 1994, Programme B has had to reposition itself. Its emphasis has therefore shifted from one of opposition to apartheid, to the need to do better quality work with greater impact on learners at less cost. The provider institution prides itself in the outputs that emerge from its programmes.

## **CASE C**

Programme C arose out of consultations between a provincial Department of Education and a foreign government donor. The provincial Department of Education was keen to seek financial and technical assistance because of its awareness of the shortage of resources to establish a new single provincial department of education, and to develop new policies and structures in support of educational transformation. On the other hand, the foreign donor had an interest in investing in a large-scale primary school improvement in the Eastern Cape. This was in line with similar projects undertaken by the donor in other countries in Africa, Asia, and Latin America.

A joint venture was designated to manage the project, made up of three development agencies. The joint venture employed a project co-ordinator and four technical advisors to implement the project. Overall project co-ordination is the responsibility of a Project Steering Committee, chaired by a Programme Manager from the provincial department, with membership representing the different directorates in the department as well as the managing agent and programme team.

The purpose of the project is to develop capacity in the provincial department to support educational transformation and to enhance performance in selected 500 primary schools. The expected outputs of the project are:

1. Transforming capacity within the provincial department for policy, planning, budgeting, implementation, community involvement, monitoring and evaluation and management.
2. Improved management capacity and performance of 500 primary schools.
3. Quality of teaching and learning improved in 500 primary schools.
4. Quality and availability of appropriate teaching and learning books, materials and resources.
5. Enhanced community involvement in primary education.

One of the key expected results of the project is the enhanced capacity of the provincial department to develop and implement a school improvement strategy supported by the necessary systemic reforms to ensure sustainability of the outcomes of the project. The expected outcomes indicate that the project addresses much more than teacher development.

The projected investment by the foreign donor in the project is R55 million. The provincial department's contribution in terms of human and other resources is expected to be larger than R55 million. There are two components to the project. The first is concerned with systemic development. Four technical advisors work with the different directorates, but principally Teacher Development, Curriculum Development, Budgeting, and Finance and Human Resources Development. The second component aims to improve the performance of 500 primary schools over three years. The schools are spread across all the six educational regions of the province. At the end of the project, it is expected that the provincial department will use the experience gained and the capacity developed in these schools to cascade primary school improvement to the rest of the districts in the province.

The target audience includes provincial and regional officials who receive on-the-job support. At the school level, the target audience includes four key teachers per school, the principal, a representative of the school governing body, and district officials who work with schools. There is no qualification offered as yet but the possibility of developing unit standards is being considered.

The assessment strategy consists of self, peer and external assessment of portfolios developed by practitioners. The emphasis is not on assessment for qualification purposes but assessment for improving practitioner practice.

Support is offered through different networks. The first is the cluster level, where five schools come together for the purposes of workshops as well as review of action strategies implemented

at the work site. The second type of support is through facilitators visiting educators at the work site to support them in terms of building school-based action groups.

## CASE D

Programme D is a project of a provincial Department of Education. Its roots go back to 1995 when, at a conference convened by the then Member of the Executive Council (MEC) for Education to discuss the state of mathematics and science education in the province, the idea was mooted of a college dedicated to those fields of study. Following discussions during 1996 and early 1997, a tripartite agreement was signed in September 1997 between the Department of Education and two donor agencies. The Project officially commenced in October 1997 although the college had accepted its first intake of students in February 1997. The college operates from the premises of a former college of education.

Programme D's mission is to serve as a specialist college for the preparation of mathematics, science and technology teachers in order to:

1. Substantially increase the output of qualified teachers in these key subjects.
2. Develop a new model of teacher education that integrates theory and practice.
3. Create a nucleus for the reform of science education in the Northern Province.

Programme D also aims to contribute to the development and renewal of curricula for pre-service educator training by researching and experimenting with a variety of innovative and progressive approaches to classroom practice and educator-training.

Programme D has two components:

1. A pre-service training course for prospective educators of mathematics, the sciences and technology, leading to a Higher Diploma in Education (HDE).
2. An in-service development programme for educators of mathematics, physical science and biology in local primary and secondary schools.

A key feature of the pre-service curriculum is that students are given the opportunity to reach a reasonably high level of knowledge in their specialist subjects (equivalent to second-year university level in their major courses), while at the same time developing a practical understanding of the processes of learning and teaching science.

As an adjunct to the college, an in-service training programme serves educators in 23 primary and 22 secondary schools, with the aim of developing and upgrading the subject knowledge and teaching skills of maths and science educators already in service. This programme comprises workshops and on-site support in the key curriculum areas of maths, physical science, biology and English across the curriculum. Some equipment is also provided. The aim is to deepen educators' knowledge of their subject and provide them with ideas on how best to teach maths and the sciences. Target schools are all within a 35-kilometre radius of the college and are principally those schools in which Programme D students do their teaching practice and classroom observations. The schools represent a cross-section of local schools, including urban and semi-rural, privileged and under-privileged schools.

Programme D currently offers two four-year Higher Diplomas in Education (Mathematics, Science and Technology), one for Secondary School teachers and one for Senior Primary School

teachers who will be specialists in mathematics, science and technology. The curricula for these diplomas aim at integrating two strands: academic knowledge of science subjects and practical knowledge of how to teach them.

Currently, 358 students are enrolled on the HDE course, annual intakes of first-year students having been as follows:

- 1997 - 116
- 1998 - 111
- 1999 - 131

Assessment of students is done continuously throughout the year and through end-of-semester exams. The continuous assessment component uses a variety of strategies, including practical tasks such as demonstrations and experiments, research reports, written assignments and written or oral tests.

Learner-support for HDE students includes course materials, compulsory lectures and tutorials, and the services of a full-time student counsellor. The college places emphasis on regular feedback to students, usually provided through face-to-face interviews with lecturers.

Programme D intends to conduct research through both the pre-service and in-service programmes that will inform the development and evaluation of its programmes and, in the longer term, hopes to share approaches, experience and materials with other colleges of education, thus contributing to the larger process of curriculum design and revision in South Africa.

Programme D, as presently structured and funded, has a four-year life-span running from September 1997 to August 2001. Thereafter, the provincial Department of Education (DoE) is expected to take on full responsibility for operating the college. For the duration of the current project, the DoE contributes a subsidy of R5000 per student per annum, equivalent to that granted to other colleges of education in the province, while development costs are borne by the donor agencies.

## **CASE E**

This case study examines the Higher Diploma in Education (HDE) in the School of Education at a university. The course is a post-graduate, fourth year, pre-service professional qualification for teachers in the General and Further Education bands of the National Qualification Framework (NQF), with specialisations relating to the intermediate and senior phases of the new school curriculum and the Further Education and Training (FET) band.

The HDE is located in the School of Education in the Faculty of Humanities. The School of Education is primarily a post-graduate interdisciplinary department offering the following qualifications:

- Certificate in Adult Education
- Advanced Diploma in Adult Education
- Further Diploma in Education
- Higher Diploma in Education
- Bachelor of Education
- Master degrees
- Phd degrees

The School presently has seventeen full-time permanent academics, three full-time contract academics, two full-time administrative/secretarial personnel and three full-time support staff. The HDE programme has run in various forms for a number of years. In the last two years, the School of Education has begun a process of redesigning the HDE as part of its broader three-year strategic plan. This has been done in response to developments in the national education sector (Committee on Teacher Education Policy and early drafts of *Norms and Standards for Educators*) and in response to programme planning and restructuring at the university more broadly. These revisions and the rationales for them are discussed under the relevant sections below. The HDE programme was revised in 1998 and sections of it are still in the process of ongoing revision.

## CASE F

Programme F was started as a response to the challenge of providing in-service development of the province's teachers through upgrading their professional qualifications, as well as improving their classroom practice in learning areas determined as relevant and critical to the development of the province in which it operates. The project is a collaborative venture between the University of Fort Hare, the provincial Department of Education, non-government education organisations (NGOs) and teacher organisations operating in the province. In addition, the project has secured linkages with the University of South Australia and the Open University.

Programme F enrolled its first intake of learner-teachers in July 1998 and its second intake in January 1999. The total enrolment is around 1000 learners. The programme offers a four-year part-time degree. It operates across the entire province.

A survey of the demand for Programme F in 1996 revealed that about 5000 teachers were interested in enrolling. The programme offers a Bachelor of Teaching in Primary Education. The mode of delivery is through distance education. The programme utilises continuous assessment which includes self, peer and tutor assessment. Programme F has a range of learner support systems which include school-based, self-help groups of other teacher-learners, tutors, centre co-ordinators, and central staff.

## CASE G

Programme G has offered a Higher Diploma in Education Junior Primary (HDE JP) since 1984. The programme was launched in response to a request from teachers who had graduated with a Junior Primary Diploma for an opportunity to study further and to specialise in their field. At the beginning of 1999 the programme had a total of 299 practising teachers enrolled at various stages of completion.

The programme is delivered in a distance education mode and is aimed primarily at upgrading the qualifications of practising teachers. Admission is open to all teachers in possession of a recognised M+3 Diploma in Education who have at least three years' teaching experience. However, if teachers hold a Diploma in Education that does not specialise in Junior Primary teaching, they will have to complete additional courses in order to be awarded an HDE (JP).

As a distance education programme, curriculum is primarily delivered through print-based course materials. Some courses are, however, beginning to use video and audio cassettes as support materials. Within the HDE (JP) learner support is provided mainly through in-text activities and

self-assessment questions. Assignments are voluntary but will be marked by the lecturers and returned with comments which help students to monitor their progress if students submit these.

Compulsory contact sessions are only held for Biology, Physical Science, Zoology, Chemistry, Computer Science, Maths and Environmental Studies. Work covered during these sessions makes up 50% of the final student mark. Other subject departments only arrange contact sessions at the request of students, and these are used mainly to do remedial work or prepare for exams.

Tutorials on Saturdays or school holidays are also arranged at the Regional Learning Centres, usually on the basis of student demand. These tutorials focus on students' problems and are run either by the lecturers or by tutors employed for the purpose by the provider institution.

Other forms of support include tutorial letters as well as videos and textbooks which students can use at Regional Learning Centres. The provider institution describes the programme as "mixed mode with distance materials, contact sessions and tutorials".

The assessment strategy consists of the following:

- self assessment activities;
- assignments marked by lecturers; and
- examinations.

However, these assessment modes are used very differently within different subjects. In most, assessment relies entirely on a final exam. In a few, ongoing assessment is used. Self-assessment activities within course materials are meant to help students assess their own progress and do not form part of a student's overall assessment. No observation or assessment of teaching competence takes place. Instead teachers get automatic credit for this on the basis that "they are already practising teachers".

## CASE H

This programme is currently in a transition phase, from a lecture-based, traditional postgraduate programme to a materials-based, distance education programme. This transition appears to be a response by the university's department of education to the greater demand for higher qualifications by teachers. It is also a response to the perceived need by the faculty to have an impact on the empowerment of teachers to participate in the current debates surrounding educational change, both in their immediate environments as well as in the broader educational context.

Programme H offers a Bachelor of Education (B.Ed.) degree, which is a degree usually taken by students who have completed a three-year bachelor's degree, followed by a one-year Higher Diploma in Education. With the current move towards flexibility and mobility, many students are now admitted to a B.Ed. degree, after having completed a three-year teaching diploma followed by a Further Diploma in Education (FDE). The full-time degree is a one-year programme, while part-time students usually take two years. The programme is modularised and each module takes one semester of study to complete. The programme is offered in partnership with a college of education which offers distance education programmes nationally. The programme largely relies on materials-based learning.

The new B.Ed. programme has essentially grown out of an older, more traditional programme, and the new materials-based learning programme requires the lecturers to work as a team rather



than as isolated individuals. Although the programme is geographically located at a particular site in KwaZulu/Natal, it is in principle available to any person in South Africa. There are approximately 750 students expected to enrol in 1999.

While the programme is open to anybody, the target audience consists mostly of previously disadvantaged teachers, away from big centres such as Durban and Johannesburg.

Programme assessment is largely by examination (70% of the final mark), as the programme is embedded in a university structure which requires this. Throughout the course, however, there are times when other forms of assessment are used.

Learner support is largely through the materials, which in the exemplar of the course supplied for our case study consisted of a reader, a lecture tape and a course guide with learning activities outlined in it. In addition, lecturers go from the university to the learning centre in order to provide tutorial support to the students.

## CASE I

This Further Diploma in Education (FDE): Development, Management and Administration was launched in 1994 by a faculty of education and a graduate school dealing with public and development management, both located at the same university, in co-operation with a non-government organisation dedicated to school management and leadership training.

The programme is aimed at school managers (principals, deputy principals, heads of departments and senior teachers) who have a minimum academic qualification of matriculation plus three years' college or university training. In addition to the minimum qualification requirement, the selection of programme participants is based on the commitment of the applicants to school-based educational and management development.

The purpose of the programme is to equip educational leaders and managers with the conceptual understanding and practical skills required to meet the challenges of a changing environment in post-apartheid South Africa.

The programme offers a Further Diploma in Education, accredited after two years of coursework and skills training. It is a part-time course, and includes both contact-based and distance learning. The programme consists of five course equivalents (two full courses and six half-courses) and twelve skills workshops. The courses are run by the university's Education Department and the postgraduate school, while the skills workshops are delivered by [the non-government organisation].

The programme has adopted an approach that is problem/issue-based, and attempts to merge theory and practical experience. Its style of delivery is based on experiential and interactive learning processes with an emphasis on case studies and group work. The delivery mode of the programme is essentially distance learning, but this is supported by a mixture of formal lectures, workshops and practical skills training. The distance learning materials are provided to learners for private study, while the courses and workshops are presented at contact sessions either at the University or at other locations identified by the programme organisers.

The programme targets students from the province in which it is located, and from adjacent provinces. Although 47 students registered in the first year, the average number of students registered for the course over the past five years has been approximately 100.

The programme has adopted both formative and summative forms of assessment. The university's Education Department requires students to undertake an examination in one course, while neither the postgraduate school nor [the non-government organisation] have an examination component. The programme has adopted two dominant modes of formative assessment to evaluate the competence of their students, namely:

- practical work projects; and
- assignments (both brief and extensive).

The results of these assessments are used to determine whether students have “passed or failed” the course. In addition to the above modes of assessment, [the non-government organisation] utilises the following assessment methods, through which learners become more active participants in the programme:

- group work undertaken by a “cluster” of schools;
- rating of candidates' attendance and participation in seminars and workshops; and
- visits to schools to assess the management competence of students.

The learner support system provided by the programme has changed over the years. In the initial stages of the programme, [the non-government organisation] had organised for School Change Facilitators to support the students, primarily at site level. However, owing to the high costs involved, this aspect of student support had to be phased out. Currently, the primary forms of learner support are those provided at contact sessions by peers, tutors and lecturers. In addition, the facilitation of cluster meetings and the so-called “buddy system” have provided very important forms of student support.

The FDE course has not been offered to first-year students this year, owing to a range of problems which among others relate to finance, administration and management. All three people interviewed diagnosed the key problem to be *the absence of a champion* to drive the Programme.

## CASE J

This Further Diploma in Education Management was started in 1994 with the first examination in 1995. It is a distance education programme run as a partnership between [a private provider] and a university. The Department of Education Management at the university is responsible for content, materials writing and assessment, while [the private provider] manages production, despatch, and administrative support. This programme is also run as a mixed-mode programme at one off-campus site.

The programme is aimed at practising teachers who have either a recognised diploma in education (M+3), or a bachelor's degree and diploma in education, or an integrated degree in education (BA(Ed)). After the diploma students can be admitted for a B.Ed. degree if they already have a first degree. If not, they need to complete Education 2 and Education 3 before entering the B.Ed. A further entry requirement is three years' teaching experience.

The duration of the programme is 18 to 24 months, but students can spend as long as four years completing the courses.

It is difficult to determine the numbers of students on the programme, because it takes students between two and four years to complete the FDE. Approximately 12% of the students who are admitted write the examination, and of these there is a pass rate of approximately 71%. In 1998, approximately 3,500 students received their Diplomas at the graduation ceremonies. The enrolment figures will differ at each stage: at the point of registration; students who are actively engaged (as indicated by their handing in of assignments); students who register for the exam; students who actually write the exam; and students who receive the diploma. However, according to the university staff, a reasonable estimation is that approximately 3 500 students sit the examinations in May and approximately 3 500 in October.

The programme is offered by distance education and reaches teachers in all nine provinces, although the majority come from Northern Province, Eastern Cape and Northern Cape.

The curriculum is communicated through the course materials - one volume for each of the five courses. Tutorial letters provide additional necessary information, and there are also prescribed textbooks.

Contact sessions held in a variety of centres offer some support to the students, but they happen only once a year. Administrative and academic support is provided telephonically by [the private provider], which also organizes one 'problem-solving' session a year in various districts in order to sort out any administrative problems students might have.

Assessment for each of the five courses on the programme consists of one examination, entry for which is determined by the student obtaining at least 50% for the one compulsory assignment.

# CHAPTER FIVE

## ANALYSIS OF THE CASE STUDIES IN TERMS OF THE *NORMS AND STANDARDS FOR EDUCATORS REPORT*

### INTRODUCTION

This Chapter comprises a cross-case analysis of the ‘convergence analyses’ which constituted Part Four of each case study. The analysis is presented in terms of eight categories of analysis which correspond closely with the seven key issues used by the case study researchers (see Annexure B) as a basis for assessing the extent to which EDS programme providers are already implementing the recommendations of the *Norms and Standards for Educators* report (Department of Education, 1998). The eight categories presented below relate to:

- ❑ Vertical and horizontal integration of teacher competence
- ❑ Integration of theory and practice
- ❑ Assessment practices
- ❑ The specialist role
- ❑ Approaches to programme design
- ❑ Quality assurance
- ❑ Provider-workplace links
- ❑ Professionalism

In each of the eight sections of this Chapter, data are presented in tabular form from the ten case studies. The EDS programmes are not named, since it is not the intention of this report to describe or to evaluate the programmes, but rather to contribute to the refinement and improvement of the *Norms and Standards for Educators* report (Department of Education, 1998). To facilitate the reading of this Chapter, a brief overview of the programmes is presented in tabular form below. For a full description and analysis of the individual programmes, the reader is invited to refer to the various case study reports.

Given the above, the reader is asked to view the data with caution at the level of assessing the philosophy, strategy, or effectiveness of any of the programmes referred to below.

### READING THE DATA

The data are presented in tabular form. Each bolded section of the tables represents a summary of the data items which follow. The data items themselves are extracts from the case study reports, and are therefore not primary data. Primary data, in the form of quotations from interview transcripts, are indicated in italics.

In the overview of the case studies below, programmes are identified by capital letters from A to J to preserve anonymity. These letters do not correspond to the numbering of the actual reports from 1 to 10. In the data tables, the left-hand column indicates the origin of the data by programme.

## OVERVIEW OF THE CASE STUDIES

<b>Name</b>	<b>Purpose</b>	<b>Institution</b>	<b>Delivery mode</b>	<b>NQF Level</b>	<b>Hours</b>	<b>Number of learners</b>
A	In-service development of assessment competence	NGO	Contact	None	35	Small groups at a time
B	In-service development of primary science teachers	NGO	Contact	None	Not established	Small groups at a time
C	In-service whole school development and department capacity building	Consortium	Mixed mode	None	Not established	500 educators
D	Pre-service training (to HDE) of maths, science and technology teachers	College	Contact	6	4800	131
E	Pre-service HDE	University	Contact	6	1200	90
F	Degree course (B.Prim.Ed.) for primary teachers	University	Distance	6	1920	1000
G	In-service HDE (Junior Primary)	College	Distance	6	1280	299
H	In-service B.Ed.	University-college partnership	Distance	7	1280	750
I	In-service development of school managers (to FDE)	University-NGO partnership	Distance	6	1200	100
J	In-service development of school managers (to FDE)	University-private provider partnership	Distance	6	1200	3500

# TEACHING COMPETENCE

## Introduction

Summarising key issues related to teacher competence in the *Norms and Standards for Educators* report (Department of Education, 1998), Dawjee and Gultig note that:

“According to the Norms and Standards the *holistic approach to competence focuses on the whole learner, that is their knowledge, skills, understanding, dispositions, attitudes and values*. Integration is central to a holistic approach to professional development. The applied and integrated competence means vertical integration of three inter-connected kinds of competence, as set out in the *Norms and Standards for Educators* report (Department of Education, 1998:111):

- At a basic level learners must demonstrate a *practical competence*. This is the demonstrated ability, in an authentic context, to consider a range of possibilities for action, make considered decisions about which possibility to follow, and to perform the chosen action.
- But in order to do this thoughtfully, and to be able to adapt actions to different contexts, learners’ actions should be grounded in a *foundational competence*. This refers to the knowledge and thinking which underpins and informs the action taken; it is the knowledge on which practice is grounded.
- Ultimately, though, good educators should demonstrate a *reflexive competence*. This refers to the ability to connect decision-making and performance (practical competence) with understanding (foundational competence) and use this to adapt to change or unforeseen circumstances, to innovate within one’s own practice, and to explain the reasons behind these innovations and adaptations.

“The report implies that while all these competences must be to some degree evident in all qualifications there should be progression as teachers proceed from Diploma in Education to Further Diploma or the B.Ed. So, for instance, while the Diploma in Education (as an M+1 to M+3 qualification) should be high in building practical and foundational competence, more advanced qualifications like the B.Ed and Further Diploma should concentrate more on developing students’ reflexive competence.

“The Norms and Standards also suggests that a horizontal integration of the following six roles is implemented in programmes:

- learning mediator;
- designer of learning programmes;
- leader, administrator and manager;
- scholar, researcher and life long learner;
- community developer with a pastoral role; and
- learning area/subject/phase specialist.

“Central to this integration, though, is that the various roles should be applied within the specialist role. So, for instance, a competence associated with “learning mediator” – understanding how learners learn – is of no use if a teacher cannot use this competence to

find out why a child in her Senior Mathematics class is struggling with a particular concept in Maths.”

(Dawjee, R. and Gultig, J., 1999)

## Vertical integration of competence – programme emphases

<b>Programmes A and B aim to address foundational and practical competence, with emphasis on the latter.</b>	
A	In its balance between foundational and practical competence, in this case developing knowledge about assessment strategies and developing stronger abilities to assess, the programme emphasis tends towards the latter.
B	The programme tries to develop an applied and integrated teaching competence by embedding key aspects of the programme – such as activity-based learning and language in science – within the broader subject knowledge of science.
<b>Programmes C, D, E, F, G, H, I and J aim to address competence in an integrated manner.</b>	
C	The training programme assesses whether practitioners are able to perform competently important actions relating to their work (practical competence), understand the theoretical basis for these actions (foundational competence), and reflect on and make changes to their practice (reflective competence).
D	The very structure of [Programme D] creates linkages between subject knowledge, educational theory relevant to the teaching of that subject at a given level (referred to within [Programme D] as “pedagogic content knowledge”) and the application of those two forms of knowledge in the classroom.
D	The level of the minor subjects is the same as first year university science courses, and the level of the major subjects is the same as second year university science courses. These courses are allocated 50% more time than comparable university courses because the educational aspects of learning and teaching the subjects are integrated into the subjects. So, for example, maths education and maths teaching methodology are integrated into the maths courses, physics education into the physics courses, and so on.
E	The outcomes for teaching practice reflect the vertical integration of which the <i>Norms and Standards for Educators</i> speak. Outcomes 1 and 2 address practical competence, outcome 3 foundational competence and outcome 5 reflective competence.
F	The curriculum draws on educational theory, is content rich and combines research and reflection.
F	The assessment procedures promote applied and integrated competence. The wide range of activities are designed for the learners to demonstrate ability to understand, plan, apply and reflect on relevant subject, curriculum and educational studies knowledge in the context of their classroom interventions.
I	The curriculum attempts to develop foundational competence through modules such as curriculum theory, theories of organisational design, and the theory of teaching and learning. Practical competence is advanced mainly through the skills workshops facilitated by [the non-government

	organisation]; the skills that are taught include conflict resolution and change management, which, according to [a team member] <i>are at the cutting edge of the South African context</i> . Reflexive competences are developed by the assessment practice of the programme, which ensures adequate and comprehensive feedback to learners who are able to reflect upon their work.
J	... The integration of practical, foundational and reflexive competences is emphasised in the goals and outcomes of the programme.
<b>Of the above, however: Programme C places less emphasis on foundational competence; Programme E emphasises reflexive competence; Programme H stresses foundational competence; Programme G focuses on content knowledge aspects of foundational competence; and Programme J emphasises foundational and practical competence.</b>	
C	[Programme C] places a great deal of emphasis on improving practical and reflective competence. In an INSET programme, it is reasonable to assume that practitioners have some foundational competence on which to build.
E	Although the outcomes for assessment for the research essay are not as explicitly stated as the teaching practice outcomes, examination of a small sample of research essays indicates that reflective competence appears to be the main competence being assessed.
E	In as much as it is possible to separate out the three interconnected kinds of competence, on balance it seems that the program is most heavily weighted to the assessment and development of reflective competence. This orientation is reflected in assessment tasks (see previous section), and in the qualification purpose. The following relevant comments are relevant: <i>The bottom line for us and the way we always differentiate between ourselves and colleges [is that] we normally say that we are not about teaching students how to teach - we don't teach them how to teach, we teach them how to think about teaching.</i>
H	Though the newer module materials deal effectively with the integration of theory and practice, the programme cannot effectively assess whether teachers integrate theory and practice at the workplace, or whether teachers have improved their practical competence as a result of the Bed programme. Similarly, a teacher's reflexive competence cannot be assessed in the school context. What is effectively assessed by this programme is the improvement in the foundational competence of the teacher.
G	Most courses ... focus too heavily on content at the expense of conceptual knowledge, and this limits students' abilities to develop the conceptual tools necessary for reflection ... [and] there is evidence that the HDE (JP) attempts to build a limited form of practical competence ... Finally, <i>reflective</i> competence is emphasised, while other components of <i>reflexive</i> competence, such as the ability to integrate and make connections, are absent.
J	It appears that the programme does not attempt to assess reflexive competence, or a <b>mix</b> of all three competences. This is despite the fact that the integration of practical, foundational and reflexive competences is emphasised in the goals and outcomes of the programme.
J	An analysis of the types of questions used [in the assignments and examinations] suggests that the emphasis ... is primarily on the assessment of foundational and practical competence.



## Assumptions regarding foundational competence

<b>In two of the ten programmes, there is an assumption that foundational knowledge, or at least aspects of foundational competence, have already been acquired by other means.</b>	
C	[Programme C] places a great deal of emphasis on improving practical and reflective competence. In an INSET programme, it is reasonable to assume that practitioners have some foundational competence on which to build.
E	Secondary students on the HDE have mostly all come through undergraduate degrees where they have between one and three years' background in their course specialisations. The Methods courses direct students to resources to fill in gaps in their subject knowledge and may offer assistance at an individual level, but developing content knowledge is not structured into what are already intensive courses. On the primary courses, students do all the methods courses and because they are generalists there is not the same expectation that they have a background in all areas.
<b>The Programme B team, who work with primary science teachers, noted, however, that many of their teachers have themselves had limited exposure to science as learners, and that confidence and competence as science teachers are lacking because of this gap in a key aspect of foundational competence.</b>	
B	[The programme] targets <i>disadvantaged teachers, many of whom, due to the policies of apartheid, lack confidence and competence in science teaching</i> ... No prior learning is required for teachers to participate in the programme. In fact, most beneficiaries are teachers who last did science during the early stages of their secondary education; few of them did science during PRESET ... <i>handholding</i> of primary school science teachers is an essential part of its work, since the majority of teachers are <i>scared of teaching science</i>

## Understandings of foundational competence

<b>A common understanding of 'foundational competence' was that it entails the linking of 'subject knowledge' and 'pedagogic knowledge'.</b>	
B	Applied and integrated teaching competence is understood by [Programme B] to mean the integration of theory and practice on the one hand, and the integration of subject knowledge and teaching methodology on the other.
D	The notion of "applied and integrated competence" is understood by key [Programme D] staff as referring to the integration, at a practical level in the classroom, of academic subject knowledge on the one hand, and pedagogic knowledge and skills on the other.
<b>Two programme teams added to this the importance of phase-specific knowledge, particularly, in the case of Programme B, the need to understand the developmental learning potential of young learners.</b>	
D	[Programme D] staff see the acquisition of subject knowledge, general pedagogic knowledge and skills, and specific school-phase knowledge as being an essential precursor to the three-dimensional integration of teaching competence.
B	[Programme B] recognises the idea of a phase specialist as an important concept. [Staff member X] believes that <i>there needs to be a more thorough</i>

	<i>tackling of how pupils in the intermediate phase learn.</i> Whilst [Programme B] is implicitly attempting to do this, she believes that there needs to be a conscious move towards pointing out to teachers what to expect of intermediate pupils' potential ability to learn and do things. She believes that teachers underestimate what children can do and that they need to know what is possible in terms of children's capability.
<b>Two case study researchers argue, on the basis of their analysis of Programme G, that a 'deep, underlying knowledge', including ethical knowledge, of the 'foundations of subjects' is what generates the ability to solve problems in a discipline, to engage with new content, to understand what difficulties learners may experience, and to appreciate why and in what way a topic needs to be addressed in the curriculum.</b>	
G	Teachers are asked to know the law that deals with freedom of religion, but their knowledge is not developed further to understand why this law is necessary in South Africa or elsewhere. Teachers could be asked to grapple with why religious studies are included in the school curriculum, or with how different religious needs and freedom of conscience issues can be addressed in a multicultural environment. It is this deep, underlying knowledge – the foundations of subjects – which enables teachers to problem-solve and to flexibly grapple with new content, or understand why learners are having difficulty with particular concepts.
G	Similarly in Professional Studies students are given information that tobacco causes heart diseases, respiratory infections and lung cancer. A deeper understanding requires the need to grapple with why tobacco causes these diseases, with the meaning of drug dependency, or with social and other processes that lead to dependency. Foundational competence also includes an understanding of why this should be included in the curriculum. It is a deeper understanding of professionalism, of the ethics and 'knowledges' that underpin professional studies that is 'foundational' to good teaching. Tobacco, in a sense, is the content of a theme through which professionalism is taught. What makes it different from a curriculum being taught to health workers is the manner in which, and the reason why, it is taught; the actual content is of secondary importance here.
<b>The Programme D team argued that the linking of disciplines is necessary to add breadth as well as depth to the content knowledge aspects of foundational competence.</b>	
D	The linking of each major subject to certain minors – such as biology major to chemistry minor, or physics major to chemistry and maths minors – is intended to ensure that students acquire the breadth, as well as the depth, of content knowledge required to teach the sciences at their chosen phase level.
<b>The Programme E team make a case for the development of competence in research conventions and discourse.</b>	
E	The research essay also assesses learners' ability to demonstrate competence in the research conventions and discourse appropriate to the discipline. This links to one of the purposes of the qualification ... namely the development of skills and competences for moving to higher qualification levels.

## Knowledge construction as an aspect of foundational competence

<b>The Programme C team argues that the construction of knowledge through ‘practice-based inquiry’, as opposed to the transmission of the knowledge of others, is an important aspect of foundational competence.</b>	
C	Practice-based inquiry is a practical process that requires practitioners to actively construct their own knowledge through a process of sharing, inquiry and reflection. Knowledge is not perceived as something that belongs to anybody but rather as something generated through a process of sharing.

## Understandings of practical and reflexive competence

<b>Two case study researchers argue, on the basis of their analysis of Programme G, that a superficial approach to the development of practical competence may marginalise the development of the ability to assess situations, plan, consider options and make decisions on the basis of analysis of particular situations.</b>	
G	There is evidence that the HDE (JP) attempts to build a limited form of practical competence. The modules provide students with opportunities <i>to do</i> things, like implement ideas or examples of lessons in their own class ... The limitations of these activities in terms of the Norms and Standards are significant. First, while it provides ‘practical tips’ on how to <i>do</i> teaching, no strategies are provided to monitor whether the teacher has tried any of the activities and to what degree they have succeeded or failed ... Secondly, and more seriously, the modules do not ... provide students with the opportunity to (and develop their competence to be able to) assess situations, plan lessons, and make decisions about how to change and adapt these – in other words, develop a teacher’s ability to consider options and make decisions.
<b>Again on the basis of their analysis of Programme G, the same case study researchers note that ‘a deep reflexive competence is built on good conceptual understanding – a thorough foundational competence’. They also note that <i>reflective</i> competence is only one aspect of <i>reflexive</i> competence.</b>	
G	A number of problems hinder the programme’s ability to develop reflective competence. Firstly, the reflection activity is not submitted to the lecturer, which this limits the ability of the mediator to develop the sophistication of the students’ reflective abilities ... Secondly, this kind of reflective activity is very unevenly used ... Thirdly, a deep reflexive competence is built on good conceptual understanding – a thorough foundational competence. Most courses, however, focus too heavily on content at the expense of conceptual knowledge, and this limits students’ abilities to develop the conceptual tools necessary for reflection. Finally, <i>reflective</i> competence is emphasised, while other components of <i>reflexive</i> competence, such as the ability to integrate and make connections, are absent.
<b>Generally, programmes found it difficult to define reflexive competence, and to incorporate its development formally into their curricula. Programme D, however, is contemplating ‘an optional, extra-credit assignment’ as a means of formalising their approach to reflexive competence.</b>	
D	Exactly how and to what extent reflexive competences relevant to the specialist role are developed within [Programme D] is less clear.

	Nevertheless, some lecturers did refer to reflective competence, which constitutes an aspect of reflexive competence ... In the meantime, in the wake of teaching practice, an optional, extra-credit assignment has been offered to second-year students to help them reflect on their teaching approaches relative to what they have learned at [Programme D]. This is a formal, if tentative, attempt at developing reflective competences.
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## Horizontal integration of competence – programme emphases

**As one provider put it, [Students] are grappling with how to make connections. I don't think we are doing enough of that and I think some of that is rooted in not enough accountability perhaps, not enough talking about courses and not enough ongoing planning. This is at the heart of 'horizontal' integration envisaged in the *Norms and Standards for Educators* report. How, across the various modules or courses that make up a programme, and across the various educator roles, is the 'making of connections' catered for? Programmes A, B, C and F seem to be designed with this kind of integration in mind, while Programme H builds it into the course materials in a comprehensive manner.**

A	It was clear that the planning of each programme occurs as a joint team effort in which members collaborate in informal and formal ways in the planning of the programme as well as consulting with teachers in the field. Each module and parts of modules are connected to each other by their position in the cycle of teaching. There is also a regular movement backwards and forwards to and from modules through the programme ... The programme does not make any direct links with other courses and programmes.
B	Whilst [Programme B] has not consciously identified a set of roles that are expected of its learners, an analysis of its activities indicates that it aligns itself very closely with the roles defined in the <i>Norms and Standards</i> report.
C	The recurring themes and common critical outcomes provide horizontal linkage across all the modules, and form the basis for assessment. Practitioners are assessed in terms of their ability to integrate the knowledge and skills delivered through different modules.
F	The teacher-learners are assessed in terms of competences in five areas: learning area and school related knowledge, communication, classroom and learner area methodology, classroom management and assessment.
H	There are links in the course materials between the different dimensions of competence and the different educator roles envisaged in the <i>Norms and Standards for Educators</i> report.

**Programme E seems to address several of the educator roles in implicit ways in various modules. Integration across modules is also more implicit than explicit, though a case study approach is now contemplated to address integration across the seven modules that make up the course.**

E	Integration of the roles highlighted in <i>Norms and Standards for Educators</i> does seem to take place in various modules but this is not done or stated explicitly in <i>Norms and Standards</i> terms. For example, aspects of the citizenship and community role would be dealt with as issues in history of education (Education core). The role of interpreter and designer of learning materials seems to be a strong component of the Methods courses although the competences may not be expressed as such in the courses.
E	Horizontal integration is assessed through teaching practice, the research essay and through each Methods course. The programme team members

	interviewed acknowledge that horizontal integration has not been strongly developed in the past in an explicit way. [A staff member] sums up his understanding of this in the following way. <i>In the past assessment was more discrete to each module. Last year we simply had two exams – the modules were put together but the questions were separate... This year they are attempting to have the integration happen through an integrated assessment task across the seven modules that make up the course using a case study.</i>
<b>One Programme E staff member referred to the informal level of integration that occurs at the level of individuals, and in a context of ‘a certain amount of freedom’.</b>	
E	... [One team member] feels this integration happens at the level of individuals and occurs in a context of a certain amount of freedom to develop identities in more nuanced ways.
<b>Programme J is typical, among the ten programmes, of the extent to which the various educator roles envisaged in the <i>Norms and Standards for Educators</i> report are addressed only partially and implicitly.</b>	
J	As far as the overall design of the programme is concerned, the links between the different courses may be described as being implicit or self-evident, in that such links are not explicitly stated either in terms of learning outcomes or assessment criteria.
J	A review of the course material, as well as assignments and examinations, suggests that only some of these contextual roles are addressed. Clearest evidence is of the integration of the community, citizenship and pastoral role ... qualities and issues such as sensitivity, interpersonal relationships, and providing socio-emotional support are dealt with.
<b>Programme B, in one of its partnership projects which leads to a FDE qualification, finds that horizontal integration is hampered when the programme is provided by different institutions. Programme I, a partnership comprising two university departments and one non-governmental organisation, encounters the same obstacle, with the three institutions complementing each other but ‘in a rather desegregated fashion’.</b>	
B	Horizontal ... integration is limited because the [qualification programme] is provided by different institutions.
I	The links between the various courses and modules, in terms of course design, context and assessment are very weak. Collaborative planning at the initial stages of the programme was very strong, but has weakened considerably over the past few years. Whilst the varying course contents offered by the three institutions appear to complement one another in respect of the various competences that they hope to develop in educators, they do so in a rather desegregated fashion. Little attempt is made to ensure that the different roles that educators are expected to play are adequately dealt with. In fact, the programme has not as yet consciously examined this issue.
<b>In the case of Programmes D and G, with either individuals or individual departments operating relatively independently (in assessment and course development respectively), it is not clear how horizontal integration can take place in a conscious or explicit manner.</b>	
D	With each department largely free to manage its own assessment procedures, and in the absence of an inter-departmental assessment committee, it is not clear how systematically the horizontal integration of skills is being assessed.
G	Evidence from staff and from the course materials suggests that the many

	<p>various courses and course writers operate independently from one another in developing and teaching their subjects. There is little if any team planning or joint decision-making about:</p> <ul style="list-style-type: none"> <li>• The overall purpose of the programme. A tightly focused programme purpose is identified as crucial by the Norms and Standards. The HDE (JP) only refers vaguely to “upgrading” and “specialisation” as a purpose.</li> <li>• What particular contribution their subject makes to the realisation of this purpose (and thus to the development of the various teacher roles).</li> <li>• How the different subjects build on, and refer back or forwards to, other subjects in an attempt to develop an integrated teaching competence.</li> <li>• A coherent and jointly decided assessment strategy that could more successfully evaluate the programme’s ability to develop an applied and integrated competence within the programme’s defined purpose.</li> </ul> <p>... Structurally, the horizontal integration and development of whole competence is limited because subjects do not function together as a programme.</p>	
<p><b>The case study researchers for Programme J noted, additionally, the absence of attention to the role of scholar, researcher and lifelong learner although the programme leads to a level 6 qualification.</b></p>		
J	<p>The <i>Norms and Standards</i> would require substantial attention to the role of scholar, researcher and lifelong learner in a qualification at this level. The review of the programme material yielded no evidence of teachers being required to conduct either empirical or literature research.</p>	

## INTEGRATION OF THEORY AND PRACTICE

The *Norms and Standards for Educators* report suggests that programmes should be conceptualised and delivered in a manner which integrates theory and practice, and strengthens provider-workplace linkages:

- ❑ A programme should work closely with schools in order to develop learner skills.
- ❑ Teaching practice should be linked to the rest of the programme, and students should be well prepared for it. Teaching practice, again, should be integral to the programme and not an ‘add-on’.
- ❑ Training should be contextually sensitive.

<p><b>Programmes A, C, D, E, F and I, aided by the various types of links they have established with educators in their schools, appear to converge most closely with the recommendations of the <i>Norms and Standards for Educators</i> report regarding the integration of theory and practice.</b></p>		
A	<p>The programme attempts, although the success of this attempt cannot be accurately measured because there is no formal assessment, to assist participants in interpreting the theory and applying it to their teaching. They do this by asking participants questions throughout the programme that force them to conceptualise and interpret ideas and theories and move towards concretising these in the context of their classrooms ... Participants</p>	

	are frequently required throughout the programme to respond to written material and ask questions of that material which will elucidate the theory. One of the major skills they aim to develop in participants is the ability to critique methodologies and material directly, and indirectly develop their control over material and methodologies.
C	The whole programme is based on linking theory with practice, and constructing theories which are tested and refined in practice.
D	The very structure of [Programme D] creates linkages between subject knowledge, educational theory relevant to the teaching of that subject at a given level (referred to within [Programme D] as “pedagogic content knowledge”) and the application of those two forms of knowledge in the classroom. As a senior lecturer expressed it: <p style="text-align: center;"><i>“Integration of content-knowledge and teaching practice is central to all [Programme D] courses”.</i></p> A key feature of the pre-service curriculum is that students be given the opportunity to reach a reasonably high level of knowledge in their specialist subjects (equivalent to second-year university level in their major courses) while at the same time developing a practical understanding of the processes of learning and teaching science.
E	The design of assessment tasks on the Professional Studies and Education courses does not appear to reflect a theory/practice dichotomy and this also true of assessment of the Methods modules. The School Experience course is where applied and integrated competence is most clearly demonstrated, and nowhere is there a theory/practice categorisation of courses.
F	There is a clear link between theory and practice as teacher-learners are required to apply what they have learnt in each of the modules to the classroom situation. During face-to-face sessions the teacher-learners share the results of their actions in the classroom. The whole program is based on linking theory with practice through action research.
I	The course emphasises skilling and theorising on an equal basis. Theory is taught through traditional methods as well as problem-posing strategies ... The programme does not have a <i>teaching practice component</i> per se, since its learners are already school-based. Assessment of learners at their sites does occur to some extent via the School Change Facilitators, although this is limited to the [non-government organisation] component of the programme and, as noted earlier, severely constrained by lack of funding.
<b>Programme B has extremely close links with schools, but evaluation reports suggest that it needs to give more emphasis to enhancing the theoretical skills of teachers. One report suggests that the programme should address <i>some of the cultural norms and philosophical beliefs about the role of children in society and the role of learners in the classroom.</i></b>	
B	The Programme attempts to combine theory and skills by ensuring that theory is taught through problem-solving strategies – activities such as planning, designing, evaluating, suggesting solutions ... [However,] [Programme B] activities tend to focus too heavily on science content, and the teaching and learning of this content, as opposed to an approach which enhances the theoretical skills of teachers. The need for [Programme B] to place greater emphasis on theory rather than skills has also been raised by the IEQ Impact Assessment Report. The report suggests that [Programme B] training should address <i>some of the cultural norms and philosophical beliefs about the role of children in society and the role of learners in the</i>

	<i>classroom</i> . It is apparent, therefore, that [Programme B] needs to create a more equitable balance between theory and practice to align itself more closely to the <i>Norms and Standards</i> report.
<b>Programme C stresses the importance of educators constructing their own theories, which are then ‘tested and refined in practice’.</b>	
C	Practice-based inquiry starts with practitioners reflecting on their practice at the work place. This is followed by a workshop where practitioners collaboratively inquire into their practice, and then by application at the work place. The whole programme is based on linking theory with practice, and constructing theories which are tested and refined in practice.
<b>Programmes H and J use learning materials and case studies respectively to compensate for the lack of access to educators in their schools.</b>	
H	Using the example of the module on <i>Creating people-centred schools</i> , it is easy to see how theory and practice are closely integrated. Ideas regarding the learning organisation are put into the context of local schools and students are provided with authentic case studies as examples. However, the module on assessment is different in that while it explores different assessment models, largely to do with assessing outcomes in the new curriculum, in practice the assessment for the module is heavily dependent on a final examination. The lecturer concerned is open about this and in fact the issue is regularly discussed in his class. So while there are parts of the programme that seem to successfully integrate theory with practice, there are problems with the degree to which the programme ‘models’ what is expected of educators.
J	The nature and design of the programme is such that there is no observation of students in the classroom or the school situation. However, an example of one of the ways in which the programme attempts to integrate theory and practice is through the use of case studies, or what one lecturer described as <i>reconstructing the situation</i> . The programme also draws upon the experiences of students when formulating assignment and exam questions, thus ensuring that the programme is contextually sensitive.
J	Although practical competence cannot be fully assessed except through observational methods, the programme assesses practical competence through written questions as far as possible.
<b>Programme G staff members recognise the lack of a strategy to ‘link theory and practice in a systematic way’, and are ‘open to suggestions as to how a practical component can be added to the programme’.</b>	
G	The fact that the HDE (JP) programme does not use teaching practice for either teacher development or assessment severely limits the programme’s ability to integrate theory and practice ... Teachers undertaking the HDE JP programme are not observed or worked with in their “authentic” teaching contexts or even in staged ‘micro-teaching’ situations during contact sessions ... [The programme] also lacks any other attempt to link theory and teaching practice in a systematic way. However according to staff and the Vice Rector (Academic), “[we are] open to suggestions as to how a practical component can be added to the programme”. There is evidence that some staff members have already thought about this and have handed in a proposal which calls for classroom observation.



## ASSESSMENT PRACTICES

The *Norms and Standards for Educators* report suggests that the assessment practices of an EDS programme must be applied and integrated:

- A programme should assess whether learners are able to integrate (*horizontally*) the knowledge and skills delivered through the different courses/modules (and roles) which make up the teacher development programme.
- A programme should assess whether learners are able to integrate (*vertically*):
  - ◆ the ability, in an authentic context, to consider a range of possibilities for action, make considered decisions about which possibility to follow, and to perform the chosen action (a practical competence);
  - ◆ the theoretical basis for and the knowledge which underpins and informs the action taken (foundational competence); and
  - ◆ the ability to connect decision-making and performance (practical competence) with understanding (foundational competence) and use this to adapt to change or unforeseen circumstances, to innovate within one's own practice, and to explain the reasons behind these innovations and adaptations (reflexive competence);
 so that they can be described as achieving an applied and integrated competence.
- The assessment strategy should assess the extent to which learners have the ability *to teach in authentic and changing South African contexts*.
- Assessment should be *ongoing and developmental*.

**Programmes A , B and C do not formally converge with the recommendations of the *Norms and Standards for Educators* report. The particular programmes reviewed by the researchers did not contain formalised assessment procedures because they were not designed as accredited courses. Additionally, in the case of Programme B, the programme team argued that a pass/fail approach would undermine their close relationship with educators and the confidence-building element of the programme. However, the non-formal assessment practices of all three programmes seem to be in keeping with key principles of the *Norms and Standards for Educators* report.**

A	The programme does not contain assessment practices which are standard and formalised. The providers have adopted a continuous assessment strategy. This continuous assessment, they argue, is necessarily fluid and informal and is carried out by the facilitator throughout the programme because it is s/he who needs to be sure where the participants are at, in order to know whether to continue or not. It is also necessary in order to establish at which points further explanation is required, or if the pace of the course needs to be changed.
A	The programme can be seen to converge in an informal way with the assessment principles underlying the <i>Norms and Standards for Educators</i> report, and ... could be said to have an ongoing and developmental assessment strategy ... There appeared to be a strong sense of commitment to assessment which is integrated and applied, and although this programme does not contain formal assessment, it is itself almost moulded by a thread of feedback which features throughout the course.
B	While [Programme B] welcomes the approach to assessment suggested by the <i>Norms and Standards for Educators</i> report, the programme has not adopted a formal assessment practice for most of its projects. Convergence

	between its approach to assessment and that proposed by the report is therefore not evident.
B	The classroom support record ... encourages learners to rate themselves against a set of predetermined criteria. The rating recorded by the learner is then discussed with the facilitator.
B	The assessment approach adopted by [Programme B] favours quite strongly the assessment of practical competence of its learners, but generally does not assess foundational and reflexive competences as advocated in the <i>Norms and Standards for Educators</i> report ... Subject knowledge is not used as an assessment criterion.
C	Assessment is formative and for the purposes of improving practitioner practice ... Assessment for each module requires practitioners to produce portfolios where they collect pieces of work which they think demonstrate what they have accomplished, how they have grown and what reflections have guided them in building their knowledge base and enhancing their practice ... The assessment strategy emphasises the extent to which practitioners have the ability to carry out action plans in authentic and changing South African contexts.
<b>Programme B, in one of its partnership projects which is qualification-bearing, does however converge much more closely with the recommendations of the <i>Norms and Standards for Educators</i> report.</b>	
B	However, the assessment strategy adopted by [Programme B] in [one of its partnerships] demonstrates a high level of vertical integration. The project successfully attempts to assess in an integrated manner the three competences suggested by the <i>Norms and Standards for Educators</i> report – practical, foundational and reflexive. It does this through the assessment of learner assignments, learner reports on workshop-based activities, and examinations. The classroom visits by field implementers are used to assess the reflexive competence of learners.
<b>Programme D appears to have the most comprehensive range of assessment strategies, and the closest alignment with the recommendations of the <i>Norms and Standards for Educators</i> report. Programmes E and F also adopt a range of strategies to achieve integrated and applied assessment. Programme D staff members themselves, however, raised concerns about reliability of assessment results within and across the various departments.</b>	
D	<p>Various forms of continuous assessment are used, including:</p> <ul style="list-style-type: none"> <li>❑ Group assessment by lecturers, the criteria for assessment having been provided in advance to students by the lecturers</li> <li>❑ Peer assessment (e.g. group members assess one another on the basis of criteria provided by lecturers in advance)</li> <li>❑ Individual oral assessment by means of discussion between lecturer and student</li> <li>❑ Individual written assessment by lecturer of student's written work</li> <li>❑ Review by lecturer of journals of work kept by students</li> <li>❑ Self-assessment by student of own work in terms of criteria developed jointly in advance between student and lecturer</li> </ul> <p>... It therefore appears that the vertical integration of competence is being promoted by comprehensive, varied, and innovative assessment practices. Moreover, many of the staff feel that their approach to assessment is being emulated in the classroom, by students from the college during their teaching practice sessions and by educators in-service who are participating</p>

	in the INSET project.
D	All lecturers observe their students in action in the classroom during the teaching practice periods ... Some staff have gone beyond observing just their own students and have undertaken micro-research in schools in order to improve their own understanding of the dynamics at work in typical local classrooms.
D	The issue of reliability in assessment ... seems to be an area of weakness within the [Programme D] course which the lecturers have identified for themselves and are seeking to address.
E	The course co-ordinators feel that formative assessment happens most effectively in methods courses where tutors are more able to structure the demands of assignments over a longer period of time.
E	Students are able to resubmit assignments to obtain a passing grade after being given feedback.
E	The research essay that students submit as part of the school experience module is planned and drafted in consultation with tutors in tutorials throughout the year. Students are encouraged to submit drafts and discuss assignments prior to submission. There is also a peer editing process prior to submission of the research essay.
E	Assessment tasks in the modules seem to require application in a specified or chosen authentic context, usually the student's teaching practice experience.
F	All teacher-learners are required to compile an assessment portfolio which contains the following: 1. Portfolio activities including core and learning area journals and activities which are self and peer assessed. 2. School visit report. 3. Profile information for further professional development. 4. Learning area self audit of knowledge. 5. Tutor marked assignments.
F	The assessment is continuous and horizontally linked across five areas: learning and school related knowledge, communication, classroom and learner area methodology, classroom management and learner assessment.
F	The assessment focuses on five dimensions of teacher-learners' growth: participation in discourse; support for learners, change in attitude and culture, leadership and attendance, and reflection and research. The assessment process entails developing an index of competence against which the competence attained by teacher-learners is assessed.
<b>Programme I has made innovative inroads into traditional weightings of assignment and examination marks, in pursuit of a developmental approach to assessment.</b>	
I	The programme implements an assessment strategy that is ongoing and developmental, and uses a mixture of formative and summative approaches. Formative assessment occurs through projects over the two-year period, whilst summative assessment occurs through the requirement of one examination at the end of the two-year period. The assignments and projects have an equal weighting, and the single exam (which is a requirement of only the university education department) is weighted equally with other assignments by the department.

<p><b>Programmes G, H, I and J, on the other hand, diverge in various ways from the recommendations of the <i>Norms and Standards for Educators</i> report. These relate, among the various programmes, to:</b></p> <ul style="list-style-type: none"> <li>❑ the lack of observation of teaching practice, which prevents the programme from assessing the student’s ability to teach in authentic and changing South African contexts;</li> <li>❑ insufficient workplace-based assessment, owing to funding constraints;</li> <li>❑ the use of content recall questions in examinations and assignments, which do not call for a critical engagement with theory, or application to practice;</li> <li>❑ the lack of systematic feedback to learners on examinations and assignments;</li> <li>❑ lack of variety in assessment instruments, and particularly the absence of assessment of practical competence;</li> <li>❑ reliance on summative assessment practices to determine a final result;</li> <li>❑ the voluntary nature of certain assignments and contact sessions;</li> <li>❑ the lack of opportunities for students to present draft assignments;</li> <li>❑ the absence of ‘horizontal’ assessment across modules, particularly in instances where learner assessment is undertaken separately by different providers of the programme;</li> <li>❑ difficulties in assessing reflexive competence, though elements of <i>reflective</i> competence are evident;</li> <li>❑ insufficient exploitation of the interactive potential of learning materials to give in-text feedback to learners, coupled with lack of monitoring of voluntary assignments and self-tests; and</li> <li>❑ expectations that learners will draw upon the knowledge and skills delivered through the other courses, though such criteria may not be made explicit to learners.</li> </ul>	
G	<p>The assessment practices of the Higher Diploma (Junior Primary) differ from the Norms and Standards so significantly that it is unlikely to be able to assess students’ “applied and integrated competence”. There is no observation of teaching practice. As all the students in this programme are practising teachers they are automatically given teaching credit once all the other requirements of the qualifications are met. In the words of staff “our programme is a distance education programme and it is difficult to observe practice.” Without such observation a programme cannot assess “competence”.</p>
G	<p>Examination questions asked in Teaching Science 11, like “<i>Explain the following terms in your own words: foundation phase, teaching strategies, innovative, creative</i>” or “<i>How does Kaplan distinguish between ‘innovative learning’ and maintenance learning?</i>” are straightforward content recall questions. Neither call for a critical engagement with theory, or application to practice. Religious Education exam questions, like “<i>Discuss the general aims of Bible Education in the primary school</i>” or “<i>Name five different teaching methods that the Bible teacher could successfully make use of</i>” reflect a similar tendency.</p>
G	<p>Assessment practices in the HDE (JP) rely heavily on traditional written assignments and examinations, in which the questions posed can be answered by referring directly back to the content of the course. The assessment instruments do not begin to assess the student’s ability to problem-solve, or to integrate general theory with the teaching of their own particular subject.</p>
G	<p>Both of these courses do attempt a few more potentially ‘open’ and critical questions, like “<i>Why do you think it is necessary for learners to think creatively in the new South Africa?</i>” and “<i>The teacher should remember that together with the learning content of the bible, prayer forms a very important part of Bible Education. Discuss this statement</i>”. A difficulty for</p>

	the researchers lay in our inability to see marked exam scripts or memos which would indicate the kinds of answers (and thus ‘competences’) markers were rewarding.
G	This programme does not provide systematic feedback on assignments, which means that even where students do the activities suggested, the answers are not used to teach and develop practice. The nature of mechanisms currently in place to allow for feedback opportunities are <i>voluntary</i> assignments and <i>voluntary</i> contact sessions. These two features provide limited opportunities to work with students on a continuous and formative basis.
G	The HDE (JP) assessment practices make use of only one of the options listed in the Norms and Standards. There is no evidence of other options such as case studies, learner assessment of own and other learners’ practice, development of a portfolio of learning materials, ethnographic studies of educational contexts, and so on. The emphasis on written forms of assessment suggests that the programme is not currently able to adequately assess practical skills in the manner proposed in the Norms and Standards.
G	The HDE (JP) relies almost exclusively on summative assessment practices to determine a final result. The assignments are voluntary and are not part of a continuous assessment programme. It is only in the Science Subjects, Computer Science and Environmental Education that practical work covered in the contact sessions makes up 50% of the total marks. Staff members are however open to ways of addressing this issue ... staff are grappling with the new policy issues and are willing to change present practices.
H	Assessment in the BEd programme is still very much in line with traditional assessment practices within the university as a whole. On average, 70% of the final assessment of most modules is in the form of an examination and it was clear from the discussion that assessment was not integrated across modules.
H	Assessment is developmental in places, though there do not appear to be opportunities for students to present draft assignments, even in the newer modules, where assessment practices are more progressive ... There is an element of developmental assessment in the sense that the workbook tasks develop the student’s abilities and these are assessed, but the assessment appears to be at the end of the course and not throughout the course.
H	The ‘older’ style of assessment relied heavily on the end-of-year examination, whereas the newer modules are prepared to change that. A ‘new’, more progressive module ... has 50% of the assessment as a final examination or assignment. The workbook counts 30% and the single formative assignment counts 20%.
H	The BEd effectively does not assess the student’s ability to teach in authentic and changing South African contexts, since there is no teaching practice associated with the BEd programme. It is expected, however, that through the coursework teachers will develop the ability to reflect on their teaching practice.
I	The programme does not assess whether learners have achieved horizontal integration of assessment as proposed in the <i>Norms and Standards for Educators</i> report. Learner assessment is undertaken separately by the three providers of the programme. There is little evidence currently of joint

	planning by the three institutions to develop appropriate holistic and integrated assessment strategies. It is important to note, however, that the programme did attempt to implement an integrated assessment model in 1994/1995. <i>The model was not sustainable mainly because the three organisations were based on different sites</i>
I	Assignments are by and large geared towards assessing the foundational competence of the learners. Projects are designed to assess their practical competence ... [the non-government organisation partner] attempts to assess the practical competence of its learners informally through the use of School Change Facilitators who monitor the progress made by learners at the school. Because the use of School Change Facilitators has not been sustainable within the programme because of funding constraints, assessment at this level has not been consistent. It is evident, therefore, that the programme does not have an equitable balance in the assessment of the practical, foundational and reflexive competences of its learners. Its focus is mainly on the assessment of foundational competence, and to some extent of practical competence.
I	The programme does not have a conscious strategy to deal with the assessment of reflexive competence. However, the comprehensive feedback that learners obtain from their assignments, together with an approach which encourages learners to redo “poor” assignments, do incorporate elements of <i>reflective</i> competence.
I	Whilst the programme agrees that school-based assessment is an ideal for which to strive, it has not been possible for the programme to sustain this because of the vast amount of resources that are required. Whilst the assessment strategy of the programme as a whole is not school-based, it is school-focused by virtue of its practical projects.
J	The overall assessment design of the programme does not lend itself to an ongoing developmental approach to the building of competence. As outlined in the <i>Student Guide</i> , methods of assessment are written assignments and examinations. In each of the five subject courses, learners are formally assessed by means of one compulsory assignment and one examination. Learners have to obtain 50% on the assignment for admission to the examination, and there are opportunities for resubmitting the assignment. However, it is the examination mark that is counted for the purposes of certification.
J	Although across the five subject courses of the diploma there are ten opportunities for assessment, the fact that there is no conscious integration of the different courses in the programme means that the students are effectively assessed twice for each of the courses – by means of an assignment followed by an examination: <i>... it is not that we cannot assess the link between practice and theory. We can do this, but we don't have sufficient opportunities. At most we assess ten times in two years. In one subject it is only twice.</i>
J	From our review of the course materials, it was clear that though there are self-tests at the end of each module no in-text feedback is provided. Furthermore, the completion of the self-tests is not monitored. Therefore, although opportunity is provided for students to engage with the material

	they are reading, this is not entirely satisfactory in terms of the <i>Norms and Standards</i> proposals because students have no means to assess whether the answers they have given to the self-tests are along the right lines.
J	Programme staff indicated that when marking assignments and exams for a particular course, they would expect students to draw upon the knowledge and skills delivered through the other courses. However it is not clear whether such criteria are made explicit to students.
J	As far as the notion of authentic context is concerned, the FDE differs with regard to the <i>Norms and Standards</i> , in that there is no assessment based on observation of learners within their working contexts ... It is clear that staff understand the context of the learners and design questions that are authentic <i>to</i> that context, but they do not assess <i>in</i> the authentic context.

## THE SPECIALIST ROLE

The *Norms and Standards for Educators* report suggests that EDS programmes should develop teachers' 'subject knowledge' and 'phase knowledge' – the 'specialist role':

- Subject knowledge teaching should be an integral part of the rest of the programme, and should not be an 'add-on'. The contextual roles should be integrated into the 'subject knowledge' or 'specialist' role. Also, teaching observation should be integrated with content knowledge taught.

<b>The programmes with the clearest mission to develop a specialism, in the manner proposed in the <i>Norms and Standards for Educators</i> report, are Programmes B (in-service programmes for primary science teachers), D (pre-service training for mathematics, science and technology), and I and J (in-service development of school management competence).</b>	
B	There is much convergence between the manner in which [Programme B] deals with the specialist role of the teacher and that suggested by the <i>Norms and Standards</i> report. The menu-driven approach ... allows for the flexible integration of various content topics with other curricular issues ... a content topic (like force) can be used as a vehicle for a teaching method or a curricular issue like language development ... [However] there is little evidence to indicate a similar emphasis on integration in its assessment practices.
D	[Programme D] staff generally evince a strong sense of the necessity to develop in their students the practical and foundational competences described in the <i>Norms and Standards for Educators</i> report for the specialist role, and the ability to transfer these competences between contexts.
I	The specialist role is in a sense an inherent part of the programme since the programme itself specialises in the development of educators as school leaders and managers. Since the FDE programme attempts to improve the leadership and management skills of educators, one could read " <i>subject</i> " knowledge as " <i>management</i> " knowledge.
J	The FDE programme has as its main purpose developing the specialist role of a teacher as educational manager. In the case of an educational management qualification, the specialist role is at the same time one of the five other roles – that of leader, administrator and manager. All five subject

	courses which constitute the programme are geared towards the development of this specialist role.
<b>An absence, manifested in several programmes, of explicit integration of the proposed contextual roles into the specialist role is exemplified in Programmes G and I.</b>	
G	The lack of integration between courses ... impacts negatively on the programme's ability to link generic contextual roles and competences to the specific demands of phase and subject. There is no cross-referencing between courses and there are also no joint assessment activities.
I	Given the fact that the programme is directed mainly at school managers, it is not surprising to find that little attention is paid to roles such as mediator of learning interpreter and designer of learning programmes and materials. The programme also pays no conscious attention to the development of the community, citizenship and the pastoral role, as defined the <i>Norms and Standards for Educators</i> report.
<b>Programme H is not concerned with a specialism.</b>	
H	The programme does not pretend to develop the specialist role of the teacher as a learning area or phase specialist.
<b>Programme A (an in-service development programme dealing with assessment practices) emphasises the phase specialism rather than learning area, as its programme addresses a cross-curricular competence.</b>	
A	In terms of the specialist role, the programme would see itself as developing a necessary general teaching specialisation (assessment practices), more particularly focused on the phase, and not located in a particular learning area.
<b>Programmes C, E, F and G do not address specialist concerns at the level of learning area knowledge. Programmes C and E deal with 'pedagogic knowledge', but assume that learning area knowledge, as an element of foundational competence, has been acquired elsewhere. Programmes F and G are focused on phase specialisms, and do not address learning area issues.</b>	
C	The Programme C places a great deal of emphasis on improving practical and reflective competence. In an INSET programme, it is reasonable to assume that practitioners have some foundational competence on which to build.
E	In the HDE (Secondary) the overarching 'specialist role' is that of subject specialist in two learning areas. This is taught through the Methods courses. The Methods courses, for the most part, assume subject knowledge has been developed in undergraduate qualifications and do not see their function as being to develop this subject competence. Staff argue that there is insufficient time on a one-year diploma to develop foundational competence ... Students are directed to teaching resources in their subject areas and encouraged to use these where they may be weak in specific content knowledge areas. On some courses, lecturers will set assignments to develop weak content areas.
F	The [Programme F] approach is cross-curricular and incorporates Foundation Phase and Intermediate Phase Studies, ECD and Multi-level teaching. There is no separate content.
G	The foundation phase ... has as its subject knowledge "specialism" Numeracy, Literacy and Life Skills. None of these are offered as compulsory subjects within the HDE (JP), although it is possible to study one of these as an "elective" ... at a second-year level. It is only in the Teaching Science 11 modules that any reference is made to numeracy and



	literacy, but then the focus is on how to teach these rather than on the subject knowledge which constitutes these learning areas. Clearly then, the HDE (JP) does not respond to the Norms and Standards suggestion that teachers be given a deep grounding in their specialist subject(s)...
<b>Programme E does, however, give more attention to learning area knowledge in the HDE (primary).</b>	
E	On the HDE (Primary) students work with five learning areas. The emphasis is also on teaching methods although there is a stronger focus on developing content knowledge than with the HDE (Secondary) methods courses. Primary students may be weak in specific learning areas such as Mathematics and sessions are scheduled specifically for the teaching of content.
<b>The researcher responsible for the study of Programme G argues that the subjects may not be offered at sufficient depth, given that the programme is categorised as a fourth-year qualification.</b>	
G	[Another] problem lies in the depth at which subjects are offered. Too many, it seems, are offered at a second-year level despite the programme being categorised as a fourth-year qualification.
<b>A member of the Programme E staff observed that programme staff need not feel under pressure to ‘prove yourself as a mathematician’, but rather as a ‘maths educator’.</b>	
E	<i>[You] are not under pressure being in a Maths department to keep proving yourself as a mathematician – you can develop an identity as a maths educator with an interest in curriculum.</i>

## APPROACHES TO PROGRAMME DESIGN

The *Norms and Standards for Educators* report suggests that an EDS provider should adopt inductive rather than deductive approaches to programme design.

For example:

- ❑ An EDS programme should be designed on the basis of research, and some or all of this research should be conducted among target learners. Conversely, a programme should not be designed through a deductive ‘desktop’ exercise.

Most programmes have some means of shaping their programme design, and the attunement of the design, through research which varies in frequency, intensity and rigour. On occasion, ‘gut feeling’, based on the teaching experience of staff, complement this research, and in some cases it has been difficult to distinguish, given the scope of this research, between ‘teacher wants’ and a rigorous analysis of ‘field needs’. Generally, strategies employed include:

- ❑ partnerships with government departments which directly impact on their ability to conduct in-depth research;
- ❑ ensuring that their material is shaped around products of authentic South African classrooms;
- ❑ employing trainers who have classroom experience;
- ❑ designing the programme in conjunction with classroom practitioners and basing it on classroom realities;
- ❑ working ‘from where the teachers/participants are at’ and allowing that experience to shape the material;
- ❑ input obtained from needs analysis workshops to develop a relevant programme;
- ❑ ‘modelling’ processes that are closest to learning and teaching in the classroom, before deciding what is needed at the higher levels, that is, the school, the district, the region and the province, to support and sustain improved learning and teaching in the classroom;
- ❑ establishing research working groups to steer the research component of the project;
- ❑ encouraging staff to attend research workshops and to register for research degrees (and securing the necessary donor funding to support this); and
- ❑ programme staff obtain information from assignments in which students are asked to identify a problem at their schools.

On the other hand, most programmes are also shaped by policy developments, such as Curriculum 2005, and therefore programme design is at least partly a deductive ‘desktop’ exercise. Strategic choices at the level of programme purpose may be driven by a more deductive approach in that they are closely related to policy developments and priorities in the transformation of education.

A	Another way in which the providers have strengthened their links with the schools, in terms of programme design and provision, is through partnerships with government departments which directly impact on their ability to conduct in-depth research. This is primarily because their access to funding is reportedly stronger, and it is only through being funded that they can conduct research.
A	They [ensure] that their material is shaped around products of authentic South African classrooms across the variety of divides as well as employing trainers who have classroom experience.
A	The programme was designed in conjunction with classroom practitioners and is based on classroom realities. It is worth noting that the programme under review has itself undergone many revisions and is still doing so as a result of the Northern Cape experience. The approach to design can therefore be described as fluid, in that the idea of change and revision appears to be written into the programme. There appeared to be a strong desire that no aspect of the programme should be seen as fixed. The providers make full use of target group input into and feedback on programme design, though the final construction and shaping of the programme is managed from within the organisation.
A	The providers acknowledged that their material was probably not always ideal, because they work from where the teachers/participants are at and allow that experience to shape the material. In this again the notions of common-sense and practical application appear to be strong determinants in shaping material.

A	In conclusion it might be said that the design approach and process is largely inductive in that it situates the design of the programme with the end-user right from the start. However, strategic choices at the level of programme purpose are driven by a more deductive approach in that they are closely related to policy developments and priorities in the transformation of education.
B	Learners have an important involvement in the design and implementation of the programme. It is [Programme B] dogma that every project/workshop series begins with a needs analysis of teachers. [Programme B] staff utilise the input obtained from the needs analysis workshops to develop a relevant programme.
B	The programme is not designed on the basis of intensive research, <i>where researchers would spend a year in the classroom identifying needs. It is instead designed on the basis of a gut feeling of where teachers are at.</i> The needs analysis workshop conducted at the start of every programme helps in this process ... [Programme B] thus uses a combination of inductive and deductive approaches in the design of its programmes.
C	The design of the training programme started with visits to districts. The project team met with parents, teachers, principals and other stakeholders. The team conducted a training needs assessment on the basis of which the training programme was designed. The programme was then presented to the Department for approval.
C	Systemic elements are important for the sustainability of the project. The project takes an 'inside-out' approach. The first step is to model those processes that are closest to learning and teaching in the classroom. The second step is to decide what is needed at the higher levels, that is, the school, the district, the region and the province to support and sustain improved learning and teaching at the classroom level. The project is attempting to develop strategies for improved learning and teaching at the classroom level and to develop structures and processes that support and sustain that improved learning and teaching at the various levels. The learner and the classroom are at the centre of school improvement.
D	In practice, the college's research programme is still at an embryonic stage and, as it stands, the programme has been designed deductively rather than inductively. To address this issue, a small research working group has been established amongst the [Programme D] senior staff to steer the overall research component of the project. Staff are encouraged to attend research workshops and register for research degrees, and funding has been secured from the Open Society Foundation and the Foundation for Research and Development for further study by staff towards such higher degrees.
F	The design of the training programme started with a review of relevant literature and a survey of training needs. National and international experts in distance and open learning assisted in the design of the programme. Ongoing monitoring and evaluation is used for programme review and refinement.
G	[The institution in which the programme is located] does carry out a limited form of 'needs analysis' in order to inform their course design. However, this focuses only on part of the field – teachers who may want to study further – rather than assessing the needs of all important stakeholders. Secondly, a methodology that is able to separate teacher wants from field

	needs must be established. Finally, an assessment of future trends and needs should form part of the research that occurs.
G	A positive development ... is that in Teaching Science 11 questionnaires have been designed and from this year teachers will be able to complete these at the end of the course. This feedback, according to the document, will help to “identify problems and improve the course”. The programme has also recently entered into partnership with schools in Mamelodi to run workshops for teachers. Staff believe that teacher feedback from this programme also influences the HDE (JP) curriculum.
H	The programme team felt strongly that they had relied heavily on their own teaching experience as well as current research to design the BEd programme.
I	The programme was originally designed on the basis of research undertaken by [one of the programme co-ordinators] in 1993/94. The study framed the needs analysis of the course. It identified 19 basic competency skills that were needed by school managers and leaders to be effective in schools. Latterly, however, the design of the programme has become more deductive. Currently there is evidence of both inductive and deductive approaches to the course design. [One of the programme co-ordinators] suggests that more extensive research needs to be undertaken in designing a programme of this nature.
I	Curriculum design for [non-government organisation component] is based on the needs of its learners, and is fairly flexible. Both [university departments] have developed their courses according to the needs of potential learners; however, in the last few years they have designed their courses according to the expected outcomes.
J	There is evidence to suggest that a combination of inductive and deductive approaches is used in the design of the programme ... The forerunner to this programme was the mixed-mode programme which is currently conducted from the Hammanskraal campus. The FDE distance education programme is thus informed by this mixed-mode programme.
J	The University has been conducting a research project, the main aim of which is to identify the changing needs of schools. Lecturers pointed out that, <i>on the basis of the responses we got, it is clear that aspects of the modules will have to be changed so that they can be relevant to the needs of students at their schools.</i> In the case of the financial management module, for example, <i>the course is designed to take into account the fact that 80% of schools do not have a school-fund account.</i>
J	In the course of the research project, students were asked to respond to questions about their current problems, and some of the needs emerging are: <ul style="list-style-type: none"> <li>• principals do not know how to tackle redeployment;</li> <li>• financial management;</li> <li>• how to involve parents and the community (this notion of governance is a new one for most schools - parents and teachers are not sure about how best to effect their new responsibilities);</li> <li>• how to interpret the new labour relations act.</li> </ul>
J	Lecturers also obtain information from the assignments in which students are asked to identify a problem at their schools and offer a solution using the theory and concepts arising out of the modules. Issues emerging are:

	<ul style="list-style-type: none"> <li>• human rights, drug abuse, sexual abuse of children (by teachers and other pupils) is a real problem</li> <li>• the safety of the children has become a major concern</li> <li>• teacher absenteeism</li> <li>• dealing with teacher resistance</li> <li>• the role of parents.</li> </ul>
<p><b>Programme E stands alone in its admission that, as a programme located within a higher education institution, it has not had the freedom to redesign its programme on any other than a deductive, policy-driven basis.</b></p>	
E	<p><i>... We've never really had the freedom to design a whole programme like this [by doing a needs analysis or research into needs] and I think generally speaking we have been very conservative about this ... We have never embarked on a total programme redesign because we thought that COTEP prevented us from doing that by its specifications of what needs to be included.</i></p>
<p><b>Programme D raises the dilemma, as an evolving, innovative project, of the nature of research that it should be conducting.</b></p>	
D	<p>There is also the difficult question – not yet resolved within the thinking of the college – as to what constitutes appropriate research for an evolving college catering largely to a disadvantaged and underdeveloped educational environment.</p>

## APPROACHES TO QUALITY ASSURANCE

The *Norms and Standards for Educators* report suggests that EDS programme providers should demonstrate characteristics that are likely to make them a self-improving, a learning organisation.

For example:

- An EDS provider should have a system of course and staff review.
- An EDS provider should keep – and use purposefully - records of learners.

Most programmes also have some means, informal or otherwise, of assuring programme quality. A common issue is that there is a lack of systematisation of quality assurance activity, some of which seems to be innovative and effective but highly informal. At times, also, it is not certain that ostensible quality assurance activity always leads to programme improvement. As one programme member put it, *there are certain things that crop up again and again, and I don't think that we have always grasped the nettle*. On another programme it seemed that *the various aspects of quality assurance are randomly and spontaneously discussed by Heads of Department with the staff and then left to individual members to implement*. Though there was in some programmes evidence of a predisposition to reshape programmes on the basis of experience, there was little evidence of thorough piloting of new initiatives. Systematic tracking of learners also seems to be rare. Generally, strategies employed include:

- independent evaluations, especially among the non-government organisations;
- feedback from the field;
- staff reviews and performance appraisals, in some cases imminently to be linked to pay progression;
- programme reviews and course reviews, in some cases ongoing but usually ranging in frequency from every one to every three years;
- the use of classroom observation to assess the degree to which training has been successful, and to observe the use of training materials in the classroom;
- the use of peer review and cross-pollination of ideas among staff;
- the identification of indicators of good practice among the target audience of the programme;
- to ensure the validity of examination results, obtaining advice on learners' examination scripts from other institutions to get feedback on the level relative to university courses;
- the use of external consultants from tertiary institutions;
- public self-analysis by the presenter on how successful a course was, during which the presenter reviews his or her plans with the learners and discusses the extent to which outcomes were attained;
- feedback, obtained by means of questionnaires, from principals of teaching practice schools;
- staff development workshops;
- records of marks and formal assessments may be kept on students, along with qualitative information on problem cases;
- a 'teaching contract', in which the balance between teaching, research and extension service work is specified according to individual productivity and skills
- peer assessment of teaching performance;
- cross-referencing of marked assignments, portfolio assessment and tutor-monitored assessment exercises;
- external examiners' reports;
- regular school visits, including learner evaluation;
- openness in the development of courses, with peer feedback;
- learner involvement in providing feedback to the programme organisers;
- the development of profiles of each learner; and
- effective team work.

A	The organisation which provides the programme could be characterised as a nascent learning organisation. A strong internal desire to develop is evident in the way the providers describe themselves as well as the way in which they develop and deliver programmes. The structures that have been set up within the [Programme A] unit itself as well as in the wider organisation are all clearly designed to promote the development of a learning organisation. However, as strong as that might appear to be, the providers acknowledged that there was a need to have more frequent independent evaluations.
A	In the everyday context of the organisation, the ethos of continual feedback

	and incorporation of feedback from the field appears to have been institutionalised, and it would appear that the feedback impacts on the training mechanisms developed by the team.
A	Staff reviews, in the form of performance appraisals, take place annually, and the [Programme A] team conducts an annual review of its programmes. Again, the need to externalise this process might prove useful and healthy to the organisation.
A	The providers use all classroom observations to assess the degree to which the training has been successful as well as to observe the use of training materials in the classroom.
B	[Programme B] – perhaps more of late – demonstrates strong characteristics of a self-improving and learning organisation. The recent introduction of its performance management system is meant to improve the effectiveness and quality of its programme.
B	Peer review is a critical component of quality assurance in the institution. [Programme B] promotes the cross-pollination of ideas between staff members, and almost all material that is published by [Programme B] is subject to peer review.
B	One of the mechanisms by which [Programme B] has ensured its self-improvement has been the external evaluations it has undertaken. [Programme B] has been evaluated regularly by external evaluators whose findings and recommendations have been utilised for the self-improvement of [Programme B].
B	The identification of <i>demonstrable characteristics of what [Programme B] considers to be good science teaching</i> (Bateson) is an initiative that is likely to ensure continuous growth amongst staff, and make it a self-improving and learning organisation.
C	Course and training reviews are undertaken on an ongoing basis. The evaluation of training includes an assessment of the quality of the facilitation process. Programme review and systematic reflection happen on an ongoing basis. Cluster and school visits are additional means for systematic review and monitoring of the project. These different forms of review provide the basis for programme redesign.
C	There is no established formal staff review process.
D	[Programme D] has from its inception been subject to evaluation of various kinds. Foremost amongst these to date has been an annual review by the Department of Education and funders of [Programme D] performance against predetermined targets. Looking more to the future, [Programme D] has itself put in place a systematic formative evaluation framework, which will draw upon outside consultants to examine seven focus areas.
D	To ensure the validity of examination results, the end-of-year examinations for Year 2 students are sent to advisers from other institutions to get feedback on the level relative to university courses.
D	Fairly extensive use has been made of external consultants from tertiary institutions as a means of quality assuring the existing curriculum.
D	Within departments, other less formal processes exist to promote quality. According to senior lecturers, each section of each course should conclude with a public self-analysis by the presenter on how that section went, during which the presenter reviews his/her objectives and lesson plan with the students and discusses the extent to which they were achieved. Apparently,

	this is happening to a limited extent.
D	Principals of [teaching practice] schools are asked to complete questionnaires giving feedback on the programme and making recommendations.
D	Although there have been no formal staff performance appraisals as yet, staff of the INSET project are in the process of introducing performance reviews using an instrument derived from Leeds University's school of education.
D	Every Wednesday, 15h00-17h00, there is a staff development workshop featuring curriculum development, research reports from staff or outsiders, presentations by departments, etc, which further contributes towards improving the quality of the programme.
D	Records of marks and formal assessments are kept on students, along with qualitative information on problem cases.
E	The system of [academic and administrative staff] review is current undergoing changes ... A major change is likely to be the linking of remuneration and salary scales to performance, and the way in which performance is assessed is currently the subject of discussion. A university-wide teaching contract is also going to be introduced, in which the balance between teaching and research and extension service work will be specified according to individual productivity and skills in the three areas reviewed – teaching, research and extension work. Part of the change involves developing a new mechanism for peer judgement of teaching performance. This may take the form of a committee.
E	The HDE staff ... go through an annual internal course review and course planning process ... The development of a system of course review along the lines suggested by <i>Norms and Standards for Educators</i> may contribute to greater communication across modules and more effective use of existing feedback on courses. [A staff member] comments: <i>This kind of model that we are trying to develop here [for the Education course] requires a fair amount of communication ... My own experience is that we go through student feedback every year and there are certain things that crop up again and again, and I don't think that we have always grasped the nettle.</i>
E	For the time they are registered students and for a few years afterwards, there are detailed records of student assessment which are accessible and well kept. However, there is no systematic tracking of students although individual lecturers may do so as part of their own research.
F	There is regular evaluation of courses by learners and tutors. The course materials are also assessed by national and international experts, approved by external experts in the field and evaluated by learners and tutors. Support systems, including tutoring, are systematically monitored by a central team and evaluated by learners. There is ongoing tutor training.
F	The quality of learner-assessed work is assured through a variety of mechanisms which include: <ol style="list-style-type: none"> <li>1. sampling of marked assignments</li> <li>2. tutor training in moderation</li> <li>3. central course team guidelines</li> <li>4. cross-referencing of marked assignments, portfolio assessment and tutor-monitored assessment exercises</li> </ol>



	5. external examiner's report 6. regular programme of school visits
F	Teacher and school improvement are monitored through principal surveys, regular school visits, and learner evaluation.
G	The HDE (JP) staff and [institutional] management recognise the importance of a systematic quality assurance system, and also recognise the lack of such a system at [the institution] in the past. At present a number of relevant but fragmented actions take place which contribute to an assessment of programme quality ... This is an impressive array of quality assurance activities. A missing feature is the systematic structuring and integration of these activities.
G	There are no formal structures for self-review and no procedures to ensure that different kinds of feedback are assessed and then used for course change, and there is no evidence of a set of criteria against which the programme is evaluated. Instead, it seems, the various aspects of quality assurance are randomly and spontaneously discussed by Heads of Department with the staff and then left to individual members to implement. Staff also acknowledge that discussions between the various departments in the HDE (JP) are limited and as a result changes take place in an <i>ad hoc</i> manner rather than uniformly across the various departments.
G	An important gap in quality assurance [is] that courses are not piloted. According to staff the reason for this is that there is simply "no time" to do this.
G	[The institution] however is in the process of setting up formal structures according to the Norms and Standards document. These will include self-review procedures, student evaluation of courses, and course review. [The institution] also hopes to write its own policy on Quality Assurance. If these innovations, as well as the fragmented practices outlined above, were integrated into a system and complemented by a wider range of activities, a quality assurance system geared at ongoing institutional self-improvement could be established. However, at the moment the <i>ad hoc</i> and fragmented nature of these activities prevents us from describing [the institution's] quality assurance system as convergent with the proposals of the Norms and Standards.
H	With the move towards a more materials-based programme, there is a resulting openness in the development of courses. There is peer feedback from other staff members, and although some lecturers remarked that the process was 'scary' it was also felt to be worthwhile since learning materials were improved continuously.
I	To a large extent, the programme demonstrates characteristics of a self-improving and learning organisation, as proposed in the <i>Norms and Standards for Educators</i> report. Both outsiders and learners are involved in evaluating and monitoring the programme at various levels. External agencies commissioned by [the non-government organisation partner] have undertaken regular evaluations of the programme, and [the two university departments] obtain feedback from external moderators in respect of learner assessment. Learners are also involved in providing feedback to the programme organisers, either through questionnaires or via the School Change Facilitators.
I	Records of learners that are maintained by the programme basically consist

	of sets of marks. No complex analysis of these marks is undertaken by the programme. The original application form [designed by the non-government organisation partner] provides a useful profile of each learner. [A team member] suggests that they are currently developing a cluster profile of learners that they are finding quite useful.
J	It is clear that programme members are engaged in activities that are likely to make them a self-improving and learning organization.
J	Programme team members seem to work together as a team, and a great deal of collaboration and discussion takes place, although one programme member commented that such collaboration and team work is <i>often informal</i> , and that <i>we should structure that more</i> .
J	The notions of self-improvement and being a learning organization are not yet systematic features of the programme. What is needed perhaps is the formulation of procedures and mechanisms that will ensure that the characteristics of <i>self-improvement</i> and <i>learning</i> built into the design of the programme.

## PROVIDER-WORKPLACE LINKS

The *Norms and Standards for Educators* report suggests that programmes should be conceptualised and delivered in a manner which integrates theory and practice, and strengthens provider-workplace linkages:

- ❑ A programme should work closely with schools in order to develop learner skills.
- ❑ Teaching practice should be linked to the rest of the programme, and students should be well prepared for it. Teaching practice, again, should be integral to the programme and not an 'add-on'.
- ❑ Training should be contextually sensitive.

Most programmes have provider-workplace links, which vary in intensity and depth. Modes of relating to schools include:

- ❑ teacher forums, established and supported by the provider;
- ❑ classroom support for learners;
- ❑ sequences of key programme activities which begin and end at the workplace;
- ❑ micro-research in schools in order to improve staff understanding of the dynamics at work in typical local classrooms;
- ❑ rotating students through a variety of schools (for teaching practice) – some well-resourced, others severely disadvantaged – to expose them to a variety of authentic contexts;
- ❑ in the case of one PRESET programme, drawing upon insights and experience gained from the INSET programme which is run from the college;
- ❑ in the case of one PRESET programme, the appointment of a PRESET/INSET Advisor, who sits at the point of intersection between the two programmes, and is therefore able to facilitate the cross-pollination of the two curricula;
- ❑ in the case of one PRESET programme, in-service classroom educators are invited to give input to curriculum development and to run staff development workshops for lecturers, to keep them in close touch with the reality of the classroom;
- ❑ in the case of one PRESET programme, in-service educators are asked to help assess students and give input on developing the assessment criteria used by programme lecturers;
- ❑ in the case of one PRESET programme, teachers from the teaching practice schools come into the institution each week to exchange perceptions with the students and their lecturers, and develop a shared understanding of the reality of the classroom situation;
- ❑ pre-service students teach in schools where the programme, through in-service projects under its umbrella, is already making interventions to improve the quality of teaching;
- ❑ teacher and school improvement are monitored through principal surveys, regular school visits, and learner evaluation;
- ❑ strong links between the work sites and the programme are maintained by ‘school change facilitators’, who play an important mentoring role for learners; and
- ❑ students are recruited from a cluster of schools as opposed to individual or school-based recruitment, which enables the programme to develop strong links with departmental district officials.

Several programmes noted, however, that the ethos of many schools is still inimical to progressive teaching practice. For example, as one programme co-ordinator observed: *Approximately 30 second-year students voluntarily spent two weeks of their July vacation teaching winter school to local matric pupils. In observing their teaching, I was surprised and disappointed to see that most of them had reverted to ‘talk and chalk’.* It is beyond the scope of this research to investigate the causes of this failed expectation. However, in another programme, the lack of co-operation from school staff to implement management changes at the school seems to be ‘an indicator that the links between the programme and the school are not unproblematic’.

A	The provider and school links are increasingly being established on a more formalised basis. The providers, in setting up teacher forums on a provincial basis, are remaining in contact with the schools after the programme, as well as initiating contact with schools prior to the programme. The providers, in working in close partnership with departments of education, have managed to gain a stronger and more credible foothold in their relationship with schools.
B	[Programme B] describes itself as an <i>in-service – in-service</i> , organisation, as opposed to an <i>out of service – in-service</i> organisation, which takes teachers to workshops out of their school contexts. [Programme B] conducts INSET in conditions in which teachers teach ... The classroom support provided by [Programme B] field implementers is key to the

	INSET approach adopted by [Programme B]. The classroom support activity <i>brings the workshop to the classroom</i> and is used to strengthen provider-workplace linkages ... Although there is a certain degree of communication between [Programme B] and school principals, [Programme B] does not have strong linkages with the school as a whole. Its linkages occur mainly through the teachers participating in its programmes.
C	The first [aspect of Programme C] is on-the-job training and support for provincial and regional education officials. The training and support is related to the daily tasks of these officials. The focus of the on-the-job training and support is on policy development, planning, budgeting, implementation, community involvement, monitoring and evaluation and management. Training is needs-based and focused on the daily tasks of the education officials.
C	At the school and district levels, the training programme includes up to four key teachers per school, principals, school governing bodies and district officials. Programme experience focuses on assisting the target group in managing change as well as becoming independent critical inquirers and solvers of problems in work or school situations. For the target group [of teachers], a sequence of key activity types take place, which begins and ends at the workplace: ... During the first phase the practitioners undertake a number of structured activities at the workplace that are geared towards raising their consciousness on the module. In the second phase practitioners meet in a selected school for a two day workshop on the module. The workshop is organised around collaborative learning. The practitioners identify an issue of concern and draw up an action strategy to address the issue when they go back to their work place. At the workplace they implement their action strategy and observe the results, which they may use to revise the strategy. In the third phase, the practitioners gather together in a cluster meeting at a selected school to share and reflect on their action strategies. They report on their action strategies and the facilitators assess the portfolios that show what the practitioners have done. The assessment is formative and meant to improve practitioner practice. In the fourth phase facilitators visit practitioners at the work site. The purpose of the visit for facilitators to understand the context in which the practitioners operate, observe and assist the practitioners in setting up school-based structures to support improvement. In addition, facilitators also assess the extent to which the training programme is having an impact at the school level.
D	Some staff have gone beyond observing just their own students and have undertaken micro-research in schools in order to improve their own understanding of the dynamics at work in typical local classrooms.
D	By rotating students through a variety of schools during that time – some well-resourced, others severely disadvantaged – [Programme D] hopes to expose them to a variety of authentic contexts within which they may apply their knowledge and practice their new-found skills.
D	The designers of the PRESET curriculum are also fortunate in being able to draw upon insights and experience gained from the INSET programme which is run from the college. The INSET programme focuses primarily on teaching practice (e.g. through workshops presented to in-service educators on how to present a particular topic in maths or one of the sciences),

	although a certain amount of content-knowledge is naturally also covered during the workshops. The basic approach, then, is to cover content through methodology rather than methodology through content. The PRESET/INSET Advisor, who sits at the point of intersection between the two programmes, is therefore able to facilitate the cross-pollination of the two curricula.
D	From time to time, in-service classroom educators are invited to give input to curriculum development and to run staff development workshops for [Programme D] lecturers. This is seen as a means to keep [Programme D] in close touch with the reality of the classroom. In service educators are also asked to help assess students and give input on developing the assessment criteria used by [Programme D] lecturers.
D	Two-way feedback is seen as a useful mechanism for developing insight and understanding amongst students and lecturers alike. For example, during the first week of teaching practice, students spend alternate days observing lessons at a school and discussing their observations and impressions with lecturers. On the Friday of that week, the teachers from the schools come into [Programme D] and exchange perceptions with the students and their lecturers. Thus, it is hoped, all perspectives can be aired and examined, and a shared understanding of the reality of the classroom situation be developed.
D	[Programme D] staff are still not entirely satisfied with the programme of teaching practice. In interviews with the researcher, a number of them commented that they would like to have been able to focus more closely on issues surrounding the school experience, such as: What should students really get out of teaching practice? How can they be helped to get it? What do in-service educators get from the students? What synergy can be developed between the college and the schools?
D	Programme staff noted, too, that the ethos of many schools is still inimical to progressive teaching practice. The Academic Vice-Rector's report of 3 September 1998 relates that: <i>"Approximately 30 second-year students voluntarily spent two weeks of their July vacation teaching winter school to local matric pupils. In observing their teaching, I was surprised and disappointed to see that most of them had reverted to 'talk and chalk'."</i>
E	In the case of the Maths students, the students are involved with the Maths Education Project (MEP) and are attached to MEP schools. This means that they teach in schools that are 'typical' of schools that are not well resourced and where the project is attempting to make interventions to improve the quality of Maths teaching ... The HDE programme has formal and informal links with the Teaching and Learning Resources Centre (TLRC) and its contact schools.
F	School visits are organised by Academic co-ordinators to assess and assist the teacher-learners with the implementation of the modules ... Teacher and school improvement are monitored through principal surveys, regular school visits, and learner evaluation.
I	The strong links between the work sites and the programme are maintained by the School Change Facilitators, who play an important mentoring role to the learners. Since students are recruited from a <i>cluster of schools</i> as opposed to individual or school-based recruitment, the programme has

	developed strong links with departmental district officials. School and cluster sites become involved in the programme through the recruitment of individual learners who have applied to do the course. Schools are informed of the involvement of learners in the programme by the School Change Facilitators. The comments made by learners in the [non-government organisation] Evaluation Report of 1995, in which they indicated the lack of co-operation from school staff to implement management changes at the school, are an indicator that the links between the programme and the school are not unproblematic.
<b>Programmes G, H and J appear to have the weakest links with schools, although Programme J has maintained its relationship with teachers in Hammanskraal, where the programme originated, which helps to keep staff in touch with what is happening in schools.</b>	
G	Most of the lecturers in the programme have experience of teaching in schools, but there is no systemic effort within the programme to develop ongoing links with schools.
H	While the course is designed to be delivered in a distance mode, 24 hours of contact time is provided through tutoring. The contact time is three full Saturdays for each core module. The contact sessions are full-day sessions to cut down on travelling and accommodation costs.
J	There is no assessment based on observation of learners within their working contexts. The links and contact that staff members have with schools are through their learners ... They are also kept up to date with what is happening at schools through their contact with teachers at the Hammanskraal campus.

## PROFESSIONALISM

The *Norms and Standards for Educators* report suggests that EDS programmes – and the programme ethos – should develop teachers as extended professionals and lifelong learners.

- ❑ Learners, for example, might be involved in programme design and implementation, either formally (for example through decision-making structures) or informally (for example, by making decisions regarding the nature of their assignments).
- ❑ Student-initiated activity (like involving themselves in tutoring schemes) might be recognised towards the qualification.
- ❑ A programme should offer possibilities for ongoing professional development. To this end, delivery should be flexible enough to allow practising teachers to attend.
- ❑ Assignments should be designed to encourage problem-solving within authentic contexts.
- ❑ A programme should prioritise *and teach* critical engagement, reasoning and reflective thinking.
- ❑ A programme should ground teaching in a wider social, economic and political understanding and awareness.

- ❑ Programme staff might be involved in policy-making and/or other social development activity outside of their mainstream activity.
- ❑ A programme should develop an ethos which actively encourages lifelong learning and ongoing professional development. How does the institution handle recognition of prior learning (RPL)? Does the institution actively recruit in-service learners?

<p><b>All of the programmes address the enhancement of professionalism. Strategies employed include:</b></p> <ul style="list-style-type: none"> <li>❑ <b>making use of both past and future participants’ input in designing programmes;</b></li> <li>❑ <b>training educators for a mentoring or training role, for example as ‘lead teachers’, who are encouraged to create support structures and stimulate professional activity at district level;</b></li> <li>❑ <b>the establishment of ‘teacher forums’, in which former programme participants involve themselves in self- and peer-tutoring;</b></li> <li>❑ <b>in the case of one PRESET programme, students are allowed some input into the development and application of assessment criteria for their own work;</b></li> <li>❑ <b>in the case of one PRESET programme, students are encouraged to participate in voluntary community-service schemes such as teaching at winter schools for matriculants, and an optional, extra-credit assignment helps them to reflect upon this experience and relate it to what they are learning;</b></li> <li>❑ <b>in the case of one PRESET programme, students are given opportunities to provide feedback to the lecturers on their professional ethos and performance;</b></li> <li>❑ <b>the involvement of teachers and former students in the marking and assessment of assignments;</b></li> <li>❑ <b>learners are encouraged to pursue higher qualifications;</b></li> <li>❑ <b>learners are trained in action research;</b></li> <li>❑ <b>one programme views teachers as <i>agents of change rather than objects to be changed</i>;</b></li> <li>❑ <b>the aim of one programme is to restore the confidence and professional status of the primary school teacher as an equal intellectual counterpart to teachers at other levels in the education system; and</b></li> <li>❑ <b>programme staff members may be involved in policy-making bodies as well as working with other organisations and participating in broader development programmes – in one programme the annual staff review recognises and requires this involvement.</b></li> </ul>	
A	The providers make full use of both past and future participants’ input in designing programmes.
A	One can see clear evidence of developing the learners as extended professionals, in that participants are frequently trained to take the training back to the field.
A	In the Teacher Forums, which the organisation is setting up, former participants will be enabled to involve themselves in self-and-peer tutoring of a sort. The degree to which this will be awarded additional credit is as yet unclear. However, it would seem that the providers would encourage teachers to use this as a contribution to the plans mooted concerning the number of hours which professional teachers will be required to perform in order to retain their registration.
A	The [Programme A] staff members are involved in varying degrees, on policy-making bodies as well as working closely with organisations, both governmental and independent, on various other and related social development programmes.
A	This material [partly developed by the participants] not only provides support while the participant teacher is introducing new assessment methods into her classroom, but also acts as a stimulus for ongoing self-

	development.
B	The [Programme B] principle of <i>empowerment of teachers for self-development and professional growth</i> ... highlights the programme ethos of developing teachers as extended professional and lifelong learners. In line with the idea of lifelong learning, [Programme B] believes that in-service is an extension of pre-service.
B	Learners have an important involvement in the design and implementation of the programme.
B	Teacher participation in programme delivery and management is reflected in the <i>collaborative engagement model</i> ... of the programme. This is underpinned by [Programme B] ideology which sees teachers as <i>agents of change rather than objects to be changed</i> ... Hence courses are run at times that suit the needs of practising teachers. Course dates are arrived at after consultation with students at the needs analysis workshop.
B	Lead teachers in particular, are encouraged to make presentations at various levels, particularly on policy matters. Lead teachers are also encouraged to create support structures at district level. These structures facilitate ongoing professional activities such as the hosting of science exhibitions, the organisation of common examinations, the management and sharing of material resources, and peer review. In this way, the principle of <i>the institutionalisation of sustainable teaching, learning and management is realised</i> .
B	Informal reflective action and thinking is ... promoted by encouraging teachers to report to their peers on what they have tried in the classrooms.
B	[Programme B] staff are actively involved in policy-making at both national and provincial levels. They have contributed to both language and curriculum policies that are currently being put in place in the “new” South Africa. Staff members are encouraged to share ideas, attend workshops and conferences, undertake presentations and participate in broader developmental programmes.
C	[The programme has adopted] a problem-solving approach that encourages educators to share richer understandings of professional concepts, skills and values.
C	The critical outcomes promoted by the modules include increased competence of practitioners as: <ul style="list-style-type: none"> <li>• critical inquirers;</li> <li>• creative thinkers;</li> <li>• communicators;</li> <li>• team workers;</li> <li>• responsible professionals; and</li> <li>• change agents.</li> </ul>
C	Recurring themes in all modules are: <ul style="list-style-type: none"> <li>• policy development and implementation;</li> <li>• managing change;</li> <li>• transforming teaching and learning processes;</li> <li>• developing and managing resources in under-resourced environments;</li> <li>• facilitator skills and processes; and</li> <li>• quality assurance.</li> </ul>
C	The total programme experience for the practitioners is based on an the practice-based inquiry approach which is an experiential process, a cycle of



	<p>inquiry where practitioners:</p> <ul style="list-style-type: none"> <li>• identify an element of the vision they want to achieve, something they want to change or improve, collect information about that element in order to understand it more clearly;</li> <li>• generate as many ideas for action (strategies) as possible and make an action plan with the action strategy that seems most useful in their context at this time;</li> <li>• act by carrying out the plan and systematically collect information about what happened;</li> <li>• think about what happened, reflect together on the results;</li> <li>• draw conclusions, evaluate what happened; and</li> <li>• plan the next action based on their reflections of what is needed to achieve the vision.</li> </ul>
D	A variety of strategies are employed to develop in students the desired professional ethos. For instance, students are allowed some input into the development and application of assessment criteria for their own work.
D	Students are encouraged, but not compelled, to participate in voluntary community-service schemes such as teaching at winter schools for matriculants. An optional, extra-credit assignment helps them to reflect upon this experience and relate it to what they are learning.
D	<p>It is made clear to college students that their lecturers are expected to set a professional example, and students are given opportunities to provide feedback to the lecturers on their professional ethos and performance. Lecturers report that written feedback has occasionally been solicited from students, with eye-opening results, e.g. “Lecturer A was unprofessional in that she ...”. Unflattering cartoons of “Department X in Action” have been used to generate discussion amongst lecturers and students of what they consider to be professional conduct. Newspaper reports are frequently used to stimulate debate on professional and ethical issues (e.g. students are asked to comment on reports of misconduct or maladministration from local schools). Lecturers seem agreed that this “open hearts” policy has improved their own professional standards:</p> <p><i>“At first we lecturers found this frightening – some were furious! – but we have learned to accept criticism now.”</i> (Lecturer)</p>
E	Ongoing professional development for practising teachers is possible through the other courses that the School of Education offers (see Part One) and the times the various courses are offered take this into account.
E	The HDE is also seen as a path for fast-tracking students to a Masters degree and students who show potential are identified and encouraged to register.
E	Program staff are involved in a range of research, policy and educational initiatives outside the school of education and their annual staff review recognises and requires this involvement.
E	The Professional Studies and Education courses, in particular, attempt to ground teaching in the wider social, economic and political arenas.
F	The [Programme F] approach promotes lifelong learning. Teacher-learners are introduced to action research and this provides for a richer understanding of professional concepts, skills and values. Practitioners are encouraged to develop their own materials and design their own workshops at the workplace. [Programme F] also prepares learners for postgraduate

	studies.
F	One of the objectives of [Programme F] is to restore the confidence and professional status of the primary school teacher as an equal intellectual counterpart to teachers at other levels in the education system.
G	At a structural level the HDE (JP) does open up opportunities for teachers to continue with their studies. Successful HDE (JP) students have access to both a B.Ed. programme – with a stronger academic focus – and other Further Diploma programmes.
H	It was felt that this was a difficult phenomenon to assess. The hope was that students of the B.Ed. programme were indeed equipped to become extended professionals; however, it was recognised that the programme could not substantiate this.
I	The provider offers significant possibilities for ongoing professional development in two ways. Firstly, it promotes the facilitation of cluster meetings that encourage peers to engage in self-development, and secondly it offers a formal opportunity for learners who pass the FDE course to do the Bachelor of Education Degree, which many learners would not have had the opportunity to do otherwise.
I	The programme is grounded in a wider social, economic, and political understanding and awareness. The team members do not believe that schools function in isolation from the broader environment. The course on <i>Contextual Problems in South Africa</i> provides a particular emphasis in this area.
I	Staff members of both [the non-government organisation] and [the university] are actively involved in national and provincial committees working on education policy development.
J	Lecturers indicated that the fact that a proportion of the students who complete the FDE in Education Management go on to a B.Ed. gives some indication that the programme does instil a desire for further learning.
J	Programme staff are intent on encouraging student interaction, the sharing of knowledge and ideas and learning from each other – which are all essential components of professionalism ... Further indications of how the programme develops the idea of a teacher as an extended professional and lifelong learner, albeit indirectly, are evidenced by the involvement of teachers and ex-FDE students in the marking and assessment of assignments. In addition, one staff member mentioned that in terms of assessment practices and design, one option might be to invite students to sit on a panel which explored aspects related to the programme design and assessment.
<b>As Welch and van Voore (1999) point out, ‘one of the functions of the <i>Norms and Standards</i> with regard to extended professionalism is to ensure that articulation across institutions is possible through the standardisation of the level of equivalent qualifications’. They note, however, anomalous articulation difficulties at one university between the FDE and the B.Ed.</b>	
The University’s current requirement that non-degreed FDE students should complete Education 2 and 3 before entering a B.Ed. implies that the FDE is not a level 6 qualification, which its REQV allocation would imply.	
<b>One college-based programme has experienced student resistance to the introduction of innovative and varied examination practices.</b>	
D	At the beginning of 1999, students refused to write supplementary exams scheduled for 19 January because they objected to the inclusion of an oral

	exam in addition to tests and assignments. They wanted candidates who had scored over 40% to be treated differently from those who had scored less than 40%. As a result, the supplementary exams were delayed till 25 January. The knock-on effect of this disrupted the beginning of classes and the teaching practice.
<b>The case study researchers for Programme I noted that while the non-government organisation partner in the consortium was able to be highly receptive to learner input into course design, the university environment is more constrained in this regard.</b>	
I	Through the School Change Facilitators, who facilitate feedback to the programme organisers, learners are able to contribute substantially to the design of the [non-government organisation] component of the course. Since the University environment is more <i>constricted</i> , it cannot be as flexible to learner input on course design and implementation. However, learner inputs are considered by [one of the two university departments]. It is interesting to note, though, that learner input was not facilitated when [one of the two university departments] changed one of its courses from non-exam status to exam status. Many of the assignments are not open to student choice. The exceptions are the practical projects that students undertake for [one of the two university departments] and in some instances where the nature of the assignment topic includes case studies and scenarios.
<p><b>One programme, in contrast, is experiencing some difficulty with:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>the building of a new ethos of collaboration, research and informal study;</b></li> <li><input type="checkbox"/> <b>building structures for peer support;</b></li> <li><input type="checkbox"/> <b>the development of a curious and critical attitude to learning and to teaching as a profession; and</b></li> <li><input type="checkbox"/> <b>teacher influence on curriculum development.</b></li> </ul>	
G	Extended professionalism also refers to building a new “ethos” or “culture” which encourages collaboration, ongoing research into practice, and ongoing formal and informal study ... The programme does not actively develop a new attitude.
G	The idea of working with other teachers in the same school or other schools – on joint research projects, or peer evaluations, for example – is not built into the programme. Instead, teachers are simply “encouraged” to form study groups, and then these are geared directly to assisting each other to pass the course.
G	The HDE (JP) ... tends to construct learners very much as curriculum receivers, rather than as curriculum developers or researchers. Generally, very little attention is paid to developing the kind of environment which builds a culture of “extended professionalism”.
G	To a certain extent [a critical and interactive learning style] is attempted in the Teaching Science 11 module, where teachers are encouraged to think of their own stories, games and drama activities to use when teaching numeracy and literacy. However, while urging activity by learners, none of these activities encourages the development of a curious and critical attitude to learning and to teaching as a profession.
G	Student involvement is limited to participation in initial ‘needs analyses’ before courses are written, and recently some post-course evaluations. Aside from these two activities, the programme does not make provision for teachers to influence the curriculum in a formal and structured way. In fact,

	<p>the very confusing structure of the programme – with terminology for different ‘booklets’ and ‘courses’ being used interchangeably, and with little guidance as to what constitutes a full package – makes it difficult for students to enter a discussion ... The staff recognise this limitation and are willing to set up formal structures through which students can begin to influence curriculum development.</p>
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# CHAPTER SIX

## FINDINGS OF THE CONVERGENCE ANALYSIS

Chapter Five has presented a cross-case analysis of the ‘convergence analyses’ which constituted Part Four of each case study. The eight categories of analysis employed are closely based on key issues which underpin the *Norms and Standards for Educators* report (Department of Education, 1998). This Chapter presents findings regarding the extent to which EDS programme providers are already implementing the recommendations of the *Norms and Standards for Educators* report. First, specific findings are presented with respect to each of these eight categories. At the end of the Chapter, a range of general findings are also presented.

### TEACHER COMPETENCE

#### Vertical integration of competence – programme emphases

- 1 Programmes A and B aim to address foundational and practical competence, with emphasis on the latter.
- 2 Programmes C, D, E, F, G, H, I and J aim to address competence in an integrated manner.
- 3 Of the above, however: Programme C places less emphasis on foundational competence; Programme E emphasises reflexive competence; Programme H stresses foundational competence; Programme G focuses on content knowledge aspects of foundational competence; and Programme J emphasises foundational and practical competence.

#### Assumptions regarding foundational competence

- 4 In two of the ten programmes, there is an assumption that foundational knowledge, or at least aspects of foundational competence, have already been acquired by other means.
- 5 The Programme B team, who work with primary science teachers, noted, however, that many of their teachers have themselves had limited exposure to science as learners, and that confidence and competence as science teachers are lacking because of this gap in a key aspect of foundational competence.

#### Understandings of foundational competence

- 6 A common understanding of ‘foundational competence’ was that it entails the linking of ‘subject knowledge’ and ‘pedagogic knowledge’.
- 7 Two programme teams added to this the importance of phase-specific knowledge, particularly, in the case of Programme B, the need to understand the developmental learning potential of young learners.
- 8 Two case study researchers argue, on the basis of their analysis of Programme G, that a ‘deep, underlying knowledge’, including ethical knowledge, of the ‘foundations of subjects’ is what generates the ability to solve problems in a discipline, to engage with new content, to understand what difficulties learners may experience, and to appreciate why and in what way a topic needs to be addressed in the curriculum.
- 9 The Programme D team argued that the linking of disciplines is necessary to add breadth as well as depth to the content knowledge aspects of foundational competence.

- 10* The Programme E team make a case for the development of competence in research conventions and discourse.

## **Knowledge construction as an aspect of foundational competence**

- 11* The Programme C team argues that the construction of knowledge through ‘practice-based inquiry’, as opposed to the transmission of the knowledge of others, is an important aspect of foundational competence.

## **Understandings of practical and reflexive competence**

- 12* Two case study researchers argue, on the basis of their analysis of Programme G, that a superficial approach to the development of practical competence may marginalise the development of the ability to assess situations, plan, consider options and make decisions on the basis of analysis of particular situations.
- 13* Again on the basis of their analysis of Programme G, the same case study researchers note that ‘a deep reflexive competence is built on good conceptual understanding – a thorough foundational competence’. They also note that reflective competence is only one aspect of reflexive competence.
- 14* Generally, programmes found it difficult to define reflexive competence, and to incorporate its development formally into their curricula. Programme D, however, is contemplating ‘an optional, extra-credit assignment’ as a means of formalising their approach to reflexive competence.

## **Horizontal integration of competence – programme emphases**

- 15* As one provider put it, [Students] are grappling with how to make connections. I don’t think we are doing enough of that and I think some of that is rooted in not enough accountability perhaps, not enough talking about courses and not enough ongoing planning. This is at the heart of ‘horizontal’ integration envisaged in the Norms and Standards for Educators report. How, across the various modules or courses that make up a programme, and across the various educator roles, is the ‘making of connections’ catered for? Programmes A, B, C and F seem to be designed with this kind of integration in mind, while Programme H builds it into the course materials in a comprehensive manner.
- 16* Programme E seems to address several of the educator roles in implicit ways in various modules. Integration across modules is also more implicit than explicit, though a case study approach is now contemplated to address integration across the seven modules that make up the course.
- 17* One Programme E staff member referred to the informal level of integration that occurs at the level of individuals, and in a context of ‘a certain amount of freedom’.
- 18* Programme J is typical, among the ten programmes, of the extent to which the various educator roles envisaged in the Norms and Standards for Educators report are addressed only partially and implicitly.
- 19* Programme B, in one of its partnership projects which leads to a FDE qualification, finds that horizontal integration is hampered when the programme is provided by different institutions. Programme I, a partnership comprising two university departments and one non-

governmental organisation, encounters the same obstacle, with the three institutions complementing each other but 'in a rather desegregated fashion'.

- 20 In the case of Programmes D and G, with either individuals or individual departments operating relatively independently (in assessment and course development respectively), it is not clear how horizontal integration can take place in a conscious or explicit manner.
- 21 The case study researchers for Programme J noted, additionally, the absence of attention to the role of scholar, researcher and lifelong learner although the programme leads to a level 6 qualification.

## **INTEGRATION OF THEORY AND PRACTICE**

- 22 Programmes A, C, D, E, F and I, aided by the various types of links they have established with educators in their schools, appear to converge most closely with the recommendations of the Norms and Standards for Educators report regarding the integration of theory and practice.
- 23 Programme B has extremely close links with schools, but evaluation reports suggest that it needs to give more emphasis to enhancing the theoretical skills of teachers. One report suggests that the programme should address some of the cultural norms and philosophical beliefs about the role of children in society and the role of learners in the classroom.
- 24 Programme C stresses the importance of educators constructing their own theories, which are then 'tested and refined in practice'.
- 25 Programmes H and J use learning materials and case studies respectively to compensate for the lack of access to educators in their schools.
- 26 Programme G staff members recognise the lack of a strategy to 'link theory and practice in a systematic way', and are 'open to suggestions as to how a practical component can be added to the programme'.

## **ASSESSMENT PRACTICES**

- 27 Programmes A, B and C do not formally converge with the recommendations of the Norms and Standards for Educators report. The particular programmes reviewed by the researchers did not contain formalised assessment procedures because they were not designed as accredited courses. Additionally, in the case of Programme B, the programme team argued that a pass/fail approach would undermine their close relationship with educators and the confidence-building element of the programme. However, the non-formal assessment practices of all three programmes seem to be in keeping with key principles of the Norms and Standards for Educators report.
- 28 Programme B, in one of its partnership projects which is qualification-bearing, does however converge much more closely with the recommendations of the Norms and Standards for Educators report.
- 29 Programme D appears to have the most comprehensive range of assessment strategies, and the closest alignment with the recommendations of the Norms and Standards for Educators report. Programmes E and F also adopt a range of strategies to achieve integrated and applied assessment. Programme D staff members themselves, however, raised concerns about reliability of assessment results within and across the various departments.
- 30 Programme I has made innovative inroads into traditional weightings of assignment and examination marks, in pursuit of a developmental approach to assessment.
- 31 Programmes G, H, I and J, on the other hand, diverge in various ways from the recommendations of the Norms and Standards for Educators report. These relate, among the various programmes, to:

- ❑ the lack of observation of teaching practice, which prevents the programme from assessing the student's ability to teach in authentic and changing South African contexts;
- ❑ insufficient workplace-based assessment, owing to funding constraints;
- ❑ the use of content recall questions in examinations and assignments, which do not call for a critical engagement with theory, or application to practice;
- ❑ the lack of systematic feedback to learners on examinations and assignments;
- ❑ lack of variety in assessment instruments, and particularly the absence of assessment of practical competence;
- ❑ reliance on summative assessment practices to determine a final result;
- ❑ the voluntary nature of certain assignments and contact sessions;
- ❑ the lack of opportunities for students to present draft assignments;
- ❑ the absence of 'horizontal' assessment across modules, particularly in instances where learner assessment is undertaken separately by different providers of the programme;
- ❑ difficulties in assessing reflexive competence, though elements of reflective competence are evident;
- ❑ insufficient exploitation of the interactive potential of learning materials to give in-text feedback to learners, coupled with lack of monitoring of voluntary assignments and self-tests; and
- ❑ expectations that learners will draw upon the knowledge and skills delivered through the other courses, though such criteria may not be made explicit to learners.

## THE SPECIALIST ROLE

- 32** The programmes with the clearest mission to develop a specialism, in the manner proposed in the Norms and Standards for Educators report, are Programmes B (in-service programmes for primary science teachers), D (pre-service training for mathematics, science and technology), and I and J (in-service development of school management competence).
- 33** An absence, manifested in several programmes, of explicit integration of the proposed contextual roles into the specialist role is exemplified in Programmes G and I.
- 34** Programme H is not concerned with a specialism.
- 35** Programme A (an in-service development programme dealing with assessment practices) emphasises the phase specialism rather than learning area, as its programme addresses a cross-curricular competence.
- 36** Programmes C, E, F and G do not address specialist concerns at the level of learning area knowledge. Programmes C and E deal with 'pedagogic knowledge', but assume that learning area knowledge, as an element of foundational competence, has been acquired elsewhere. Programmes F and G are focused on phase specialisms, and do not address learning area issues.
- 37** Programme E does, however, give more attention to learning area knowledge in the HDE (primary).
- 38** The researcher responsible for the study of Programme G argues that the subjects may not be offered at sufficient depth, given that the programme is categorised as a fourth-year qualification.
- 39** A member of the Programme E staff observed that programme staff need not feel under pressure to 'prove yourself as a mathematician', but rather as a 'maths educator'.

## APPROACHES TO PROGRAMME DESIGN

- 40** Most programmes have some means of shaping their programme design, and the attunement of the design, through research which varies in frequency, intensity and rigour. On occasion, 'gut feeling', based on the teaching experience of staff, complement this research, and in



some cases it has been difficult to distinguish, given the scope of this research, between ‘teacher wants’ and a rigorous analysis of ‘field needs’. Generally, strategies employed include:

- ❑ partnerships with government departments which directly impact on their ability to conduct in-depth research;
- ❑ ensuring that their material is shaped around products of authentic South African classrooms;
- ❑ employing trainers who have classroom experience;
- ❑ designing the programme in conjunction with classroom practitioners and basing it on classroom realities;
- ❑ working ‘from where the teachers/participants are at’ and allowing that experience to shape the material;
- ❑ input obtained from needs analysis workshops to develop a relevant programme;
- ❑ ‘modelling’ processes that are closest to learning and teaching in the classroom, before deciding what is needed at the higher levels, that is, the school, the district, the region and the province, to support and sustain improved learning and teaching in the classroom;
- ❑ establishing research working groups to steer the research component of the project;
- ❑ encouraging staff to attend research workshops and to register for research degrees (and securing the necessary donor funding to support this); and
- ❑ programme staff obtain information from assignments in which students are asked to identify a problem at their schools.

On the other hand, most programmes are also shaped by policy developments, such as Curriculum 2005, and therefore programme design is at least partly a deductive ‘desktop’ exercise. Strategic choices at the level of programme purpose may be driven by a more deductive approach in that they are closely related to policy developments and priorities in the transformation of education.

- 41 Programme E stands alone in its admission that, as a programme located within a higher education institution, it has not had the freedom to redesign its programme on any other than a deductive, policy-driven basis.
- 42 Programme D raises the dilemma, as an evolving, innovative project, of the nature of research that it should be conducting.

## QUALITY ASSURANCE

43 Most programmes also have some means, informal or otherwise, of assuring programme quality. A common issue is that there is a lack of systematisation of quality assurance activity, some of which seems to be innovative and effective but highly informal. At times, also, it is not certain that ostensible quality assurance activity always leads to programme improvement. As one programme member put it, *there are certain things that crop up again and again, and I don’t think that we have always grasped the nettle* (Hewlett, 1999). On another programme it seemed that the various aspects of quality assurance are randomly and spontaneously discussed by Heads of Department with the staff and then left to individual members to implement. Though there was in some programmes evidence of a predisposition to reshape programmes on the basis of experience, there was little evidence of thorough piloting of new initiatives. Systematic tracking of learners also seems to be rare. Generally, strategies employed include:

- ❑ independent evaluations, especially among the non-government organisations;
- ❑ feedback from the field;
- ❑ staff reviews and performance appraisals, in some cases imminently to be linked to pay progression;

- ❑ programme reviews and course reviews, in some cases ongoing but usually ranging in frequency from every one to every three years;
- ❑ the use of classroom observation to assess the degree to which training has been successful, and to observe the use of training materials in the classroom;
- ❑ the use of peer review and cross-pollination of ideas among staff;
- ❑ the identification of indicators of good practice among the target audience of the programme;
- ❑ to ensure the validity of examination results, obtaining advice on learners' examination scripts from other institutions to get feedback on the level relative to university courses;
- ❑ the use of external consultants from tertiary institutions;
- ❑ public self-analysis by the presenter on how successful a course was, during which the presenter reviews his or her plans with the learners and discusses the extent to which outcomes were attained;
- ❑ feedback, obtained by means of questionnaires, from principals of teaching practice schools;
- ❑ staff development workshops;
- ❑ records of marks and formal assessments may be kept on students, along with qualitative information on problem cases;
- ❑ a 'teaching contract', in which the balance between teaching, research and extension service work is specified according to individual productivity and skills
- ❑ peer assessment of teaching performance;
- ❑ cross-referencing of marked assignments, portfolio assessment and tutor-monitored assessment exercises;
- ❑ external examiners' reports;
- ❑ regular school visits, including learner evaluation;
- ❑ openness in the development of courses, with peer feedback;
- ❑ learner involvement in providing feedback to the programme organisers;
- ❑ the development of profiles of each learner; and
- ❑ effective team work.

## **PROVIDER-WORKPLACE LINKS**

- 44** Most programmes have provider-workplace links, which vary in intensity and depth. Modes of relating to schools include:
- ❑ teacher forums, established and supported by the provider;
  - ❑ classroom support for learners;
  - ❑ sequences of key programme activities which begin and end at the workplace;
  - ❑ micro-research in schools in order to improve staff understanding of the dynamics at work in typical local classrooms;
  - ❑ rotating students through a variety of schools (for teaching practice) – some well-resourced, others severely disadvantaged – to expose them to a variety of authentic contexts;
  - ❑ in the case of one PRESET programme, drawing upon insights and experienced gained from the INSET programme which is run from the college;
  - ❑ in the case of one PRESET programme, the appointment of a PRESET/INSET Advisor, who sits at the point of intersection between the two programmes, and is therefore able to facilitate the cross-pollination of the two curricula;
  - ❑ in the case of one PRESET programme, in-service classroom educators are invited to give input to curriculum development and to run staff development workshops for lecturers, to keep them in close touch with the reality of the classroom;

- ❑ in the case of one PRESET programme, in-service educators are asked to help assess students and give input on developing the assessment criteria used by programme lecturers;
- ❑ in the case of one PRESET programme, teachers from the teaching practice schools come into the institution each week to exchange perceptions with the students and their lecturers, and develop a shared understanding of the reality of the classroom situation;
- ❑ pre-service students teach in schools where the programme, through in-service projects under its umbrella, is already making interventions to improve the quality of teaching;
- ❑ teacher and school improvement are monitored through principal surveys, regular school visits, and learner evaluation;
- ❑ strong links between the work sites and the programme are maintained by ‘school change facilitators’, who play an important mentoring role for learners; and
- ❑ students are recruited from a cluster of schools as opposed to individual or school-based recruitment, which enables the programme to develop strong links with departmental district officials.

Several programmes noted, however, that the ethos of many schools is still inimical to progressive teaching practice. For example, as one programme co-ordinator observed: Approximately 30 second-year students voluntarily spent two weeks of their July vacation teaching winter school to local matric pupils. In observing their teaching, I was surprised and disappointed to see that most of them had reverted to ‘talk and chalk’. It is beyond the scope of this research to investigate the causes of this failed expectation. However, in another programme, the lack of co-operation from school staff to implement management changes at the school seems to be ‘an indicator that the links between the programme and the school are not unproblematic’.

- 45 Programmes G, H and J appear to have the weakest links with schools, although Programme J has maintained its relationship with teachers in Hammanskraal, where the programme originated, which helps to keep staff in touch with what is happening in schools.

## PROFESSIONALISM

- 46 All of the programmes address the enhancement of professionalism. Strategies employed include:
- ❑ making use of both past and future participants’ input in designing programmes;
  - ❑ training educators for a mentoring or training role, for example as ‘lead teachers’, who are encouraged to create support structures and stimulate professional activity at district level;
  - ❑ the establishment of ‘teacher forums’, in which former programme participants involve themselves in self- and peer-tutoring;
  - ❑ in the case of one PRESET programme, students are allowed some input into the development and application of assessment criteria for their own work;
  - ❑ in the case of one PRESET programme, students are encouraged to participate in voluntary community-service schemes such as teaching at winter schools for matriculants, and an optional, extra-credit assignment helps them to reflect upon this experience and relate it to what they are learning;
  - ❑ in the case of one PRESET programme, students are given opportunities to provide feedback to the lecturers on their professional ethos and performance;
  - ❑ the involvement of teachers and former students in the marking and assessment of assignments;
  - ❑ learners are encouraged to pursue higher qualifications;
  - ❑ learners are trained in action research;
  - ❑ one programme views teachers as agents of change rather than objects to be changed;

- the aim of one programme is to restore the confidence and professional status of the primary school teacher as an equal intellectual counterpart to teachers at other levels in the education system; and
  - programme staff members may be involved in policy-making bodies as well as working with other organisations and participating in broader development programmes – in one programme the annual staff review recognises and requires this involvement.
- 47 As Welch and van Voore (1999) point out, ‘one of the functions of the Norms and Standards with regard to extended professionalism is to ensure that articulation across institutions is possible through the standardisation of the level of equivalent qualifications’. They note, however, anomalous articulation difficulties at one university between the FDE and the B.Ed.
- 48 One college-based programme has experienced student resistance to the introduction of innovative and varied examination practices.
- 49 The case study researchers for Programme I noted that while the non-government organisation partner in the consortium was able to be highly receptive to learner input into course design, the university environment is more constrained in this regard.
- 50 One programme, in contrast, is experiencing some difficulty with:
- the building of a new ethos of collaboration, research and informal study;
  - building structures for peer support;
  - the development of a curious and critical attitude to learning and to teaching as a profession; and
  - teacher influence on curriculum development.

## GENERAL FINDINGS OF THE CONVERGENCE ANALYSIS

### General findings: teacher competence

[C1](#) The ten programmes display a wide variety in the emphases they place on different aspects of competence. Most of the programmes aim to develop competence in an applied and vertically integrated manner (Department of Education, 1998:111), but in practice do not. This is sometimes deliberate: for example, one higher education programme assumes learning area knowledge to be in place and therefore does not address this aspect of foundational competence.

[C2](#) This leads to a second general finding, namely that only two programmes address learning area knowledge as a matter of course:

- One of these (B) deals with primary science (though foregrounding teaching methodology), while the other (D) addresses mathematics, science and technology.
- Two programmes (I and J) deal with a different kind of specialism, school management.
- Another (A) addresses assessment practices with a phase rather than a learning area focus.
- Two programmes (C and F) address general phase issues, without addressing phase specialisms.
- Two programmes (E and G) address general phase and learning area issues, but deal as a matter of course with ‘pedagogic knowledge’ rather than learning area knowledge.
- Finally, one programme (H) addresses generic education issues.

[C3](#) Complementing the above finding, two programme teams (C and E) explained their assumption that foundational learning area knowledge has already been acquired by other means, and is therefore only addressed in terms of individual needs. This assumption may be more widely shared at an implicit level among providers. In counterpoint to this is the observation of

Programme B that many primary science teachers have not studied science themselves since the early years of secondary school.

**C4** The understanding of foundational competence seems to differ widely across providers, and also with respect to what is set out in the *Norms and Standards for Educators* report (Department of Education, 1998). The differences relate to issues such as:

- ❑ the nature and degree of phase-specific knowledge that educators need;
- ❑ how ‘subject knowledge’ relates to ‘pedagogic knowledge’;
- ❑ the role of ‘generative’ and ‘ethical’ knowledges that provide the ‘deep structure’ of knowledge in a discipline;
- ❑ the linking of disciplines to add breadth as well as depth to the ‘subject knowledge’ of an educator;
- ❑ the need to recognise, as an aspect of foundational competence, the construction of knowledge through inquiry into practice; and
- ❑ the need for educator competence in research, including research conventions and discourse.

**C5** Understandings of practical and reflexive competence also differ across providers, and with respect to what is set out in the *Norms and Standards for Educators* report (Department of Education, 1998). The differences relate to issues such as:

- ❑ the danger of overly superficial approaches to practical competence which may marginalise the development of an educator’s ability to assess situations, plan, consider options and make decisions on the basis of analysis of particular situations;
- ❑ the need to build a deep reflexive competence on a sound basis of conceptual knowledge as an aspect of foundational competence;
- ❑ the need to view *reflective* competence as only one aspect of *reflexive* competence, which encompasses ‘the ability to connect decision-making and performance (practical competence) with understanding (foundational competence) and use this to adapt to change or unforeseen circumstances, to innovate within one’s own practice, and to explain the reasons behind these innovations and adaptations’ (Department of Education, 1998:111); and
- ❑ the need to formalise programme approaches to the assessment and recognition of reflexive competence through, for example, credited assignments.

**C6** A number of phenomena underpin the general lack of ‘horizontal integration’ (Department of Education, 1998:112) within and across the six proposed educator roles. These difficulties are set out below:

- ❑ the design, implementation and assessment of the courses or modules that constitute a programme are sometimes carried out in a discrete fashion by different departments, units or individuals within an institution, each with a degree of ‘design freedom’ or professional autonomy;
- ❑ the design, implementation and assessment of the courses or modules that constitute a programme are sometimes carried out in a discrete fashion by different institutions operating in a partnership or consortium, each with a distinct tradition of delivery, an idiosyncratic philosophy and a particular defined role in the programme;
- ❑ horizontal integration is often not made explicit in planning terms, and sometimes happens informally or spontaneously, rather than in a planned or systematic way; and
- ❑ the role of ‘scholar, researcher and lifelong learner’ (Department of Education, 1998:69) suffers the extremes of being prized and formally credited by some programmes and neglected by others, in one case by a level 6 qualification.

## **General findings: integration of theory and practice**

[C7](#) Convergence in terms of the integration of theory and practice seems to hinge on the closeness of the provider's relationships with schools. Three of the distance education providers (G, H and J), for example, appear to struggle to achieve this integration, with Programme G in particular difficulties in the absence of a practical component in its programme. On the other hand, two of the distance education providers (Programmes F and I), one of which (Programme F) has a thousand learners enrolled, seem to have developed effective strategies for integration. It should be noted, however, that Programme I has not been able to sustain its historical levels of interaction with educators in their schools because of lack of funding. The five face-to-face providers (A, B, C, D and E), some of which work on a very intensive basis in schools, seem to find integration easier.

## **General findings: assessment practices**

[C8](#) Assessment practices seem to be an area of particular concern when matched with the recommendations regarding applied and integrated assessment set out in the *Norms and Standards for Educators* report (Department of Education, 1998). Paradoxically, the assessment practices of three of the programmes (A, B and C) seem to converge in principle with key recommendations, although they are not accredited programmes. None of these programmes has therefore formalised its assessment procedures. Four of the qualification-bearing programmes (D, E, F and I) have made innovative inroads into traditional approaches to assessment, and have adopted a range of strategies to achieve integration and application. Three qualification-bearing programmes (G, H and J), all of which are relatively large distance education programmes, do not seem to satisfy the recommended requirements in this regard, variously (and among other more detailed reasons) because of:

- ❑ the lack of close relationships with schools, and the concomitant lack of observational assessment;
- ❑ insufficient learner support systems;
- ❑ excessive reliance on summative assessment, and general lack of variety in assessment instruments; and
- ❑ insufficient exploitation of the interactive potential of learning materials to give in-text feedback to learners.

## **General findings: the specialist role**

[C9](#) Four programmes (B, D, I and J) have a clearly developed specialism, and one (A) has a clearly developed phase specialism. The five remaining programmes either do not address a specialist role, or address a phase specialism without addressing learning area knowledge within that specialism. Generally, learning area and phase-relevant teaching methodology seems to be prized above learning area knowledge. Programme D is the clearest exception in this regard.

## **General findings: research design**

[C10](#) Providers employ a wide range of strategies to design and attune their programmes, to the extent that there are rich opportunities for learning across programmes in this regard. Most programmes are shaped by some form of research, at least in the origins of the programme, though in some cases the research could be classified as highly informal. Sometimes, for

example, teacher preferences are analysed at the expense of researching, in a more encompassing way, the needs of the field. On the other hand, most programmes are informed by a combination of inductive field research approaches and deductive ‘desktop’ work. In most cases, external drivers such as Curriculum 2005 or the work of the Committee on Teacher Education Policy have exercised considerable influence on programme development.

[C11](#) The weakest links between research and programme development and redesign are to be found among some of the higher education providers. In one case, Programme I, the research of a non-government organisation has provided the basis for a higher education qualification. Similarly, among non-government providers there seems to be a stronger tradition of needs analysis in the field to inform programme development. One provider questioned the extent to which higher education providers are wholly free, in the current regulatory framework, to redesign their programmes.

## **General findings: quality assurance**

[C12](#) Providers employ a wide range of formal and informal strategies for quality assurance purposes, to the extent that, as with programme design issues, there are rich opportunities for learning across programmes. A common issue is that there is a lack of systematisation of quality assurance activity, some of which seems to be innovative and effective but highly informal. At times, also, it is not certain that ostensible quality assurance activity always leads to programme improvement. Though there was in some programmes evidence of a predisposition to reshape programmes on the basis of experience, there was little evidence of thorough piloting of new initiatives. Systematic tracking of learners also seems to be rare.

## **General findings: provider-workplace links**

[C13](#) Close provider-workplace links have already been mentioned as an important factor in the integration of theory and practice. Once again, a wide range of formal and informal provider strategies for establishing such links provides rich opportunities for learning across programmes. The providers generally seem to have close and fruitful relationships with schools. However, three of the qualification-bearing programmes (G, H and J), all of which are relatively large distance education programmes, seem to be particularly lacking in terms of contact with schools.

[C14](#) A number of providers referred to the ‘inimical’ environment in schools with regard to transformation of both management and teaching practices. This low level of receptivity to change was cited as a factor which minimises programme success, to the extent that learners may be unable to apply competences acquired or developed through the programmes.

## **General findings: extended professionalism**

[C15](#) Providers employ wide range of strategies to develop ‘extended professionalism’ among learners. Again, there are rich opportunities here for learning across programmes. The providers generally seem to attach importance to professionalism, which is often ‘modelled’ rather than ‘taught’. The most innovative approaches are arguably to be found in Programme D, while university providers referred to difficulties at the level of incorporating learner input into course design owing to internal institutional constraints in this regard. Conversely, the non-government providers appear to be more flexible. Another difficulty in the higher education sector was

encountered in terms of articulation between higher education programmes such as the Further Diploma in Education (ostensibly level 6 on the National Qualification Framework) and the Bachelor of Education (a level 7 qualification). Only one programme (G), a qualification-bearing programme which is a relatively large distance education programme, is experiencing some difficulty with incorporating professional development into its programme.



# CHAPTER SEVEN

## A CROSS-CASE CRITIQUE OF THE *NORMS AND STANDARDS FOR EDUCATORS* REPORT

### INTRODUCTION

Chapters Seven and Eight set out the implications of the research for the *Norms and Standards for Educators* report. Chapter Seven comprises a cross-case analysis of the various strands of critique of *Norms and Standards for Educators* that emerged in the case studies, and which constituted Part Five of each case study. In Chapter Eight, findings emanating from this analysis are presented.

### READING THE DATA

The data are presented in tabular form. Each bolded section of the tables represents a summary of the data items which follow. The data items themselves are extracts from the case study reports, and are therefore not primary data. Primary data, in the form of quotations from interview transcripts, are indicated in italics.

In the overview of the case studies below, programmes are identified by capital letters from A to J to preserve anonymity. These letters do not correspond to the numbering of the actual reports from 1 to 10. In the data tables, the left-hand column indicates the origin of the data by programme.

### GENERAL POLICY ISSUES

**Programme A explicitly welcomed the *Norms and Standards for Educators* report, as it provides a ‘model which can be followed’ in terms of roles and competences. The integration of theory and practice, and the proposed strengthening of linkages between providers and schools, were ‘viewed as an extremely positive feature of the policy’. Programme F also ‘found the conceptual shifts underlying the assessment practices in the *Norms and Standards for Educators* report easy to understand, useful and desirable’.**

A	The policy document has assisted [the programme team] in their development of the programme curriculum, especially with reference to specialisation and the core competences and roles of educators. It has clarified the degree to which the programmes need to focus on these and it is providing a model which can be followed ... The shift towards a stronger integration of theory and practice as well as the concomitant strengthening of linkages between the provider of programmes and the school was viewed as an extremely positive feature of the policy.
F	The academic co-ordinators ... found the conceptual shifts underlying the assessment practices in the <i>Norms and Standards for Educators</i> report easy to understand, useful and desirable. The principles of horizontal and vertical integration are in line with the assessment practices of [Programme F].

<p><b>By and large, programme providers engaged in a positive way with the recommendations of <i>Norms and Standards for Educators</i>. A number of general criticisms emerged in this process regarding the process and style of policy formulation. Programme C felt that ‘policy making is increasingly top down, and heavily reliant on experts who are removed from the coalface’, and criticised the language of the report as ‘inaccessible’. Programme E argued that the document is ‘written for the Department of Education’ and expressed a need for ‘better implementation documents pitched at course developers and administrators’. Programme I pointed out that pointed out that ‘the conceptual shifts on which this study is based are not laid out as such in the <i>Norms and Standards for Educators</i> report’.</b></p>	
C	The programme team believes that policy making is increasingly top down, and heavily reliant on experts who are removed from the coalface. The result is a lack of resonance with reality and conditions on the ground.
C	The language seems inaccessible to most of the people who are supposed to implement policy.
E	[The programme co-ordinators offered] a more general critique of confusion about the audience pitch of the <i>Norms and Standards for Educators</i> document. It is not felt to be an implementation document but a document written for the Department of Education. The co-ordinators expressed concern that without better implementation documents pitched at course developers and administrators, <i>Norms and Standards for Educators</i> may run into some of the same implementation problems as Curriculum 2005.
I	[One staff member] pointed out that the conceptual shifts on which this study is based are not laid out as such in the <i>Norms and Standards for Educators</i> report.
<p><b>Other general criticisms related to substantive features of the <i>Norms and Standards for Educators</i> report:</b></p> <ul style="list-style-type: none"> <li>❑ Programme E suggested that there are ‘implications for flexible admission and RPL [recognition of prior learning] that <i>Norms and Standards for Educators</i> does not address’, and that the report ‘<i>doesn’t deal with the whole sociological story of massifying higher education – increasing diversity</i>’ for which ‘lecture rooms are not prepared’.</li> <li>❑ Programme I suggested that the concept of notional learning hours might be ‘abused both by learners and providers’, especially in the absence of ETQAs.</li> </ul> <p><b>Programme E mentioned the difficulty of ensuring ‘representivity of the course team in relation to race, gender, geographic location and experience’, given the current freezing of posts and budget cuts. They suggested that providers might be monitored against a five- or ten-year institutional plan, on the basis of current staff profiles and projections.</b></p>	
E	There are, [a staff member] argues, implications for flexible admission and RPL that <i>Norms and Standards for Educators</i> does not address: <i>Norms and Standards deals with the expected curriculum – it doesn’t deal with the whole sociological story of massifying higher education – increasing diversity ... and lecture rooms are not prepared for it.</i>
I	Programme members have expressed a concern about the concept of notional learning hours. It is suggested that this concept be examined more thoroughly and should be subject to further debate, since there is a fear that the system of notional hours will be abused both by learners and providers. Given the fact that ETQAs have not yet been established, and given the strong possibility that they will not be able to deal timeously with applications for accreditation, there is concern that fly-by-night providers will take advantage of the system.
E	... <i>Norms and Standards for Educators</i> also raised issues concerning the representivity of the course team in relation to race, gender, geographic location and experience. Part 4 raised some of the constraints on short-term changes in

	<p>relation to staff representivity, namely, post freezing and budget cutting. [One staff member] suggest a strategy based on the following:  <i>You have to take a longer term view. You could ask institutions for a five- or ten-year plan – ask them to look at their staff profile and retirement profile and then assess on the basis of what staff profile they will have longer term... then you can monitor that and hold people to their projections.</i></p>
<p><b>Programme D, by developing close links between its in- and pre-service programmes, seems to have found a model for the integrated development of competence, and for the development of ‘extended professionalism’.</b></p>	
D	<p>In bringing these two strands - PRESET and INSET – so close together in the same schools, [Programme D] provides a useful and practical model of both horizontal and vertical integration of teaching competences, as well as application in authentic contexts. This is one of the strongest features of the programme and constitutes a powerful argument for the feasibility of such integration, as envisaged by the <i>Norms and Standards</i> report, within a single EDS programme ... [Programme D also] demonstrates the feasibility of many of the recommendations [regarding ‘extended professionalism’] of the <i>Norms and Standards</i> report.</p>

## CONTEXT AND SYSTEM ISSUES

<p>Several programmes alluded to the difficulty of working in a system which is ‘inimical to change’:</p> <ul style="list-style-type: none"> <li>□ Programme D argued against a ‘<i>steady state</i>’ approach and in favour of a ‘<i>transitional period wherein the historical realities of inequality and disadvantage are recognised and accommodated</i>’.</li> <li>□ Programme I argued that ‘guidelines [are needed] on how to deal with the current reality of teachers who have the same formal qualifications, but widely disparate competences’.</li> </ul> <p>Programme D argued that ‘<i>too much [evidence of progress] is being expected too soon</i>’ with respect to innovative programmes.</p>	
D	<p>[Programme D] staff felt that the extent to which the education system is inimical to change, at both macro and micro levels, needs to be better understood and managed.</p>
D	<p>“<i>Norms and Standards seems ... to have been written for some sort of ‘steady state’ in the future when everyone comes into tertiary education with a sound basic education of much the same standard. Right now, we need some sort of transitional period wherein the historical realities of inequality and disadvantage are recognised and accommodated.</i>”</p>
I	<p>The reality is that whilst teachers may have the same qualification levels (for example, M+3), these are highly disparate in many ways. The programme team members suggest that the <i>Norms and Standards for Educators</i> report provide guidelines on how to deal with the current reality of teachers who have the same formal qualifications, but widely disparate competences.</p>
D	<p>“<i>Too much is being expected too soon. After one year, the evaluators appear, demanding evidence of progress. In education systems, that is unrealistic.</i>”</p>

<p><b>Programme I highlighted the emphasis which the <i>Norms and Standards for Educators</i> report places on individual competence ‘while ignoring the question of systems change’. Staff argued that ‘whilst the thrust of the country’s education management development policy is about changing both individuals and organisations, the NQF, SAQA and <i>Norms and Standards for Educators</i> are concerned only about changing individuals’. They cautioned against a ‘greater paper chase (albeit a more relevant one), than exists in the country presently’. They specifically argued that the modularisation of qualifications, though useful for learners, ‘does not promote much-needed links between educator development and school change and transformation’.</b></p>	
I	<p>Modularisation, whilst useful for learners in that it helps to build up their qualifications over time, has inherent dangers in that it may not allow learners sufficient time to interact with their contextual reality, reflect upon their learning and change existing practices. Thus modularisation does not promote much-needed links between educator development and school change and transformation. The <i>Norms and Standards for Educators</i> report is seen to be limited to the issue of individuals having access and gaining knowledge, while ignoring the question of systems change. The programme members believe that whilst the thrust of the country’s education management development policy is about changing both individuals and organisations, the NQF, SAQA and <i>Norms and Standards for Educators</i> are concerned only about changing individuals. Moreover, whilst the FDE course has attempted to marry individuals and institutions, the <i>Norms and Standards for Educators</i> report has ignored the examination of systems change, and it is suspected that this will create a greater paper chase (albeit a more relevant one), than exists in the country presently.</p>
I	<p>... The assessment of learners that have been trained as individuals, coupled with the expectation that they demonstrate practical competence at a systems level, is problematic. The question posed is therefore whether it is possible to provide skills training to learners as <i>individuals</i>, and then observe them <i>in systems</i> to demonstrate practical competence? [One programme team member] suggests that more research is needed in this area.</p>

## COLLABORATION AMONG EDS PROVIDERS

<p><b>Two programmes made, explicitly and implicitly, reference to issues of collaboration which are absent in the <i>Norms and Standards for Educators</i> report:</b></p> <p>□ Programme E referred to the ‘greater regional dialogue and planning’ which is encouraged by the Higher Education Bill.</p> <p>Programme J made the point that ‘the report is written from the perspective of the employer, whereas the university needs to look at the academic training needs of the teacher’, cautioning that ‘... <i>we must be very careful not to expect the same kind of results as the in-service trainer which has the hands-on requirements and opportunities. We cannot get the same results.</i>’</p>	
E	<p>[<i>Norms and Standards for Educators</i>] does not contain references to course review being done in conjunction with other regional institutions. The Higher Education Bill requires planning in relation to the priorities of a region, and the course co-ordinators note that future developments on the HDE are likely to be influenced by decisions arising from greater regional dialogue and planning.</p>
J	<p>The report [programme staff argued] is written from the perspective of the employer, whereas the university needs to look at the academic training needs of the teacher:</p> <p><i>I think you can say that the main outcome is, if I go back to that teacher’s school and ask the principal is this teacher now a better</i></p>

	<p><i>manager, then we want the answer to be yes. That at the end of the day is our main outcome.</i></p> <p>...</p> <p><i>But you see it is very difficult for this [Norms and Standards] type of assessment which is done from the viewpoint of the employer. We are from the viewpoint of the academic training needs of the teacher, so we must be very careful not to expect the same kind of results as the in-service trainer which has the hands-on requirements and opportunities. We cannot get the same results.</i></p>
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## EQUIVALENCE AMONG EDS PROGRAMMES

<p><b>Two programmes referred, explicitly and implicitly, to the problem of equivalence in the accreditation of educator development.</b></p> <p>□ <b>Programme D, which is currently negotiating for its mathematics, science and technology courses to be recognised as credits towards degrees, argued that ‘universities tend to be rather jealous of their statutory power to confer degrees and are sometimes reluctant to accredit other providers’ courses towards a whole degree offered by the university’.</b></p> <p><b>Programme C, which as an in-service programme has adopted a strategy of formative multi-mode assessment, suggested that ‘the assessment practices in the <i>Norms and Standards</i> seem to be geared to PRESET programmes and for qualification purposes’.</b></p>	
D	<p>Universities tend to be rather jealous of their statutory power to confer degrees and are sometimes reluctant to accredit other providers’ courses towards a whole degree offered by the university. Giving further consideration to the equivalence of courses to a wider range of degrees may address the universities’ legitimate concerns about standards and quality, and at the same time encourage other EDS providers to improve the breadth and depth of subject knowledge covered by their courses.</p>
C	<p><i>The assessment practices in the Norms and Standards seem to be geared to PRESET programmes and for qualification purposes. Programme C [however] is an INSET programme with a focus on improving practitioner practice. The programme is not qualification awarding. Assessment is for formative purposes and is embedded in a practice-based approach, which is an action research strategy for improving practice. Self, peer and facilitator assessment of demonstrated competence are the main assessment modes.</i></p>

## COMPETENCE

<p>A number of conceptual difficulties were raised with respect to general notions of competence and knowledge:</p> <ul style="list-style-type: none"> <li>❑ Programme C ‘argued that <i>The Norms and Standards</i> report seems silent on the process of knowledge generation ... through a process of sharing, inquiry and reflection’.</li> <li>❑ Programme I staff questioned whether ‘there exists a notion of partial competence, and whether it is possible, for example, for an individual to have ‘half a competence’. According to [a programme team member], <i>somebody is either competent or not</i>, and there are no fractional measures.’</li> <li>❑ Programme I expressed concern about the concept of modularisation, and ‘whether assessment based on individual modules could effectively measure competences identified across a course as a whole.’ Programme I argued that ‘modularisation does not really achieve what it sets out to do because it restricts the horizontal integration of assessment’.</li> <li>❑ Programme I staff also argued that horizontally integrated assessment across educator roles would be ‘extremely complex’ if a student ‘could begin a course, drop it in the middle (after receiving several credits), then pick it up again after several years’.</li> </ul> <p>In contrast to Programme I, Programme E (which does not define exit level outcomes for the qualification as a whole) argued that outcomes can only be effectively defined at the level of modules. They expressed concern about ‘expressing both outcomes and assessment criteria ... at too high a level of abstraction ... In general, staff consulted felt it is appropriate to assess and stipulate outcomes at module level or at course level for the teaching practice component of <i>School Experience</i> where there are concrete skills that can be assessed’.</p>	
C	The <i>Norms and Standards</i> report seems silent on the process of knowledge generation ... [Programme C] requires practitioners to actively construct their own knowledge through a process of sharing, inquiry and reflection.
I	The problem hinges on the question of whether there exists a notion of partial competence, and whether it is possible, for example, for an individual to have ‘half a competence’. According to [a programme team member], <i>somebody is either competent or not</i> , and there are no fractional measures.
I	[Another] concern is about the concept of modularisation, and whether assessment based on individual modules could effectively measure competences identified across a course as a whole. Programme members feel that modularisation does not really achieve what it sets out to do because it restricts the horizontal integration of assessment. In this sense, therefore, the <i>Norms and Standards for Educators</i> report appears to provide contradictory signals to its readers. On the one hand, it promotes the idea of modularisation and the organisation of learning programmes in ‘bits’ (unit standards), and on the other hand it strongly advocates the integration of these ‘bits’. Team members feel that the problem with modularisation is the incorrect assumption that little bits can make a whole, and that a skills and knowledge base can be built up systematically over time. A further implication could be that a student could begin a course, drop it in the middle (after receiving several credits), then pick it up again after several years. The implications for horizontal assessment in this context would, according to the team members, be extremely complex.
E	[Programme E] does not have exit level outcomes against which students are assessed at qualification level and there is some concern about expressing both outcomes and assessment criteria at too high a level (in structural terms) and at too high a level of abstraction ... In general, staff consulted felt it is appropriate to assess and stipulate outcomes at module level or at course level for the

	<p><i>teaching practice component of School Experience where there are concrete skills that can be assessed. [A staff member] explains, You can stipulate outcomes at qualification level but you can't assess the students on them – it would become empty. It would be so broad and abstract as to become empty – you have to assess outcomes at the level of concrete skills and cannot assess at too high a level of abstraction ... it doesn't mean anything.</i></p> <p>... This issue also raises challenges to notions of integration across courses. At present there are no assessment criteria across courses, for example, Methods courses, Professional Studies or Education, and the same reservations were expressed as the above relating to qualifications. The course co-ordinators and HOD feel it is possible to assess this integration at the level of the research essay or in teaching practice but not across the modules, for example, across Professional Studies. Integration may take place across modules as a result of lecturer and student comments and through assessment task design but it may not be possible to explicitly assess this.</p>
<p><b>A number of difficulties were raised with respect to the feasibility of the approach to integrated competence which is outlined in the <i>Norms and Standards for Educators</i> report:</b></p> <ul style="list-style-type: none"> <li>❑ <b>Programme D staff referred to difficulties with the development of reflexive competence, arguing that ‘it is extremely difficult to develop such higher-order cognitive skills in students upon whom so much time must be spent in providing content input and developing practical and foundational competences’.</b></li> <li>❑ <b>Programme D staff point to ‘evidence that the progressive classroom practice which most students are able to demonstrate during observation lessons may not be sustained over time or when the students do not feel that their performance is being assessed’.</b></li> </ul> <p><b>Programme J staff refer to the learning paradigm that students are accustomed to: ‘<i>We found in the beginning that students are not familiar with this way of work; they would simply read the book and want to [regurgitate] what they’ve read and that would mean that I can now pass the exam, but when it comes to applying that knowledge they found it very difficult to master ...</i>’. This is interpreted by the case study researchers as a caution that a major shift towards the development of applied and integrated competence needs to be introduced gradually.</b></p>	
D	<p>Reflexive competences are considered by programme staff to be more problematic, although several lecturers said that they do attempt to develop them in their students and to exemplify them in their own teaching practice. Two senior lecturers expressed the opinion that it is extremely difficult to develop such higher-order cognitive skills in students upon whom so much time must be spent in providing content input and developing practical and foundational competences ... The amount of time and effort which both college lecturer and student must devote to remedying the deficiencies of the student’s basic and further education inevitably means that elements of the higher education curriculum suffer.</p>
D	<p>All of this should make for strong links between the theoretical and the practical components of the courses, and between the college and the workplace as a whole. Yet there is evidence that the progressive classroom practice which most [Programme D] students are able to demonstrate during observation lessons may not be sustained over time or when the students do not feel that their performance is being assessed.</p>
J	<p>Staff ... commented [on applied competence] as follows:</p> <p><i>We found in the beginning that students are not familiar with this way of work; they would simply read the book and want to [regurgitate] what they’ve read and that would mean that I can now pass the exam, but when it comes to applying that knowledge</i></p>

	<p><i>they found it very difficult to master ... At the end of the day they find this approach more useful because they will have to implement what they've learnt into their situations at their schools.</i></p> <p>The implication for the <i>Norms and Standards</i> is that it is important to introduce changes slowly, because learners take a long time to adjust.</p>
<p><b>Two programme providers raise contrasting problems relating to the notion of foundational competence:</b></p> <p>□ <b>Programme B argues for a more focused approach to ‘hard core science teaching support’, suggesting that roles other than the specialist role may be desirable but ‘not feasible in the current context owing mainly to time and financial constraints’.</b></p> <p><b>Programme E, conversely, assumes that the learning area specialism has been adequately dealt with through undergraduate disciplinary study, and argues that ‘Norms and Standards for Educators seems to focus more on INSET when it stresses the development of adequate foundational competence [but] ... does not speak to the issues that arise in ‘capping’ diplomas ...’.</b></p>	
B	<p>[Programme B] feels that it is desirable to expect teachers to be involved in community, citizenship and pastoral roles. It believes, however, that this is not feasible in the current context owing mainly to time and financial constraints. [One staff member] believes that this role may be an interesting diversion, but that the priority should be <i>hard core science teaching support</i>.</p>
E	<p><i>Norms and Standards for Educators</i> seems to focus more on INSET when it stresses the development of adequate foundational competence; the report does not speak to the issues that arise in ‘capping’ diplomas where programme designers have to assume that certain foundational knowledge has been developed in undergraduate disciplinary areas.</p>

## EDUCATOR ROLES

<p><b>Various programme providers raised difficulties with the conceptualisation of educator roles:</b></p> <p>□ <b>Programme A made a strong case for the incorporation of the ‘assessment specialisation as a necessary component of all educator development programmes’.</b></p> <p>□ <b>Programme B staff argued that ‘the concept of phase specialist is of vital importance’, adding that EDS programmes need to ‘address what is possible, in terms of children’s ability to learn, in each of the different school phases’.</b></p> <p>□ <b>Programme B is highly critical of the ‘designer’ role, suggesting that this ‘could lead to a misplaced notion that teachers should become textbook writers’, which is ‘neither feasible nor appropriate’.</b></p> <p>□ <b>With respect to the ‘lifelong learning’ role, Programme B suggested that ‘the concept of a <i>scholarly approach</i> may be more appropriate, since the intention is not to change the vocation of teachers to that of <i>scholars</i>.’</b></p> <p>□ <b>Programme I, a management development programme, argued that ‘the <i>Norms and Standards</i> ... appears to understand the specialist role more as a subject or phase specialism, than as a career path within one of the other roles’.</b></p> <p><b>Programme I staff requested clarity regarding ‘how the other roles are to be integrated with the specialist management role in the case of Education Management qualifications’.</b></p>	
A	<p>The providers agreed that the shift to an emphasis on the specialisation of the teacher was important, but they were critical of the <i>Norms and Standards for Educators</i> report because it did not incorporate assessment specialisation as a necessary component of all educator development programmes. The providers argued that all teacher education programmes should be developing, especially in the light of the new curriculum, teachers who are enhancing their skills as</p>



	assessors and who develop abilities to assess not only differently but more effectively.
B	[Programme B] believes that the concept of phase specialist is of vital importance. It believes, however, that there is little understanding currently about the potential for children's learning in the different phases of school life. [Programme staff] suggest, therefore, that EDS programmes need to address what is possible, in terms of children's ability to learn, in each of the different school phases.
B	There is concern that the quest for learner involvement in programme design and implementation could lead to a misplaced notion that teachers should become textbook writers. [Programme B] feels that it is neither feasible nor appropriate for teachers to play a role in designing their own learning programmes. [Programme B] also feels that whilst teachers should be encouraged to involve themselves in life-long learning, EDS providers should not convert teachers into "scholars", as suggested by the <i>Norms and Standards for Educators</i> report. [A staff member] suggests that the concept of a <i>scholarly approach</i> may be more appropriate, since the intention is not to change the vocation of teachers to that of <i>scholars</i> .
J	The <i>Norms and Standards ...</i> appears to understand the specialist role more as a subject or phase specialism, than as a career path within one of the other roles ... [Also,] the <i>Norms and Standards</i> needs to be clearer about how the other roles are to be integrated with the specialist management role in the case of Education Management qualifications.
<p><b>Also with respect to the conceptualisation of educator roles, Programme E 'expressed reservations about the foregrounding of roles ... and some confusion about how they are expected to work with them in practice'. Programme E staff:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>did not feel that hours could be attached to the educator roles in the form of credits; and</b></li> <li><input type="checkbox"/> <b>requested an indication of what kinds of courses, content areas, and modes of delivery can help to achieve these [educator] roles.</b></li> </ul>	
E	The course co-ordinators expressed reservations about the foregrounding of roles in <i>Norms and Standards for Educators</i> and some confusion about how they are expected to work with them in practice. They did not feel that it was possible or desirable to attach hours to them as credits and were not clear how the concept of credits linked up with these roles (for example, on page 87 of <i>Norms and Standards for Educators</i> ) ... The programme co-ordinators ... feel that an indication should be given of what kinds of courses, content areas, and modes of delivery can help to achieve these [educator] roles.

## ASSESSMENT ISSUES

Doubts and concerns regarding the feasibility of applied and integrated assessment were raised by several providers:

- ❑ Programmes A and B refer to ‘financial and human resource constraints’ with regard to classroom-based assessment.
- ❑ Programme D staff argued that assessment in an authentic school context creates difficulties at the level of reliability and comparability, and that ‘most colleges and schools do not have the management infrastructure to sustain a sufficiently high degree of internal communication to achieve reliability across individual staff and departments responsible for assessment’.
- ❑ Programme A staff argued that ‘problem-solving assignments constitute a sound approach which could be implemented, [but] ... argued that facilitators would have to have access to the classroom in order to assess the degree to which the problem had actually been solved.’
- ❑ Programme I argued that the observation of practical competence is ‘very subjective’, and that such competence is therefore ‘extremely difficult to measure’.
- ❑ Programme I argued that ‘successful completion of a course is crucial to accessing a range of opportunities which are not otherwise available’, and that therefore ‘... there is a tendency for South African learners to get through the assessment process at all costs. Hence implementing assessment in an authentic context implies that there has to be a strong element of trust in the relationship between the learners and the “system”. Programme team members believe that the element of trust is missing ...’
- ❑ Programme E suggested that applied and integrated assessment is possible ‘at the level of the research essay or in teaching practice but not across the modules ... Integration may take place across modules as a result of lecturer and student comments and through assessment task design, but it may not be possible to explicitly assess this.’

Finally, Programme B, like Programme A, is able to tailor its programmes to different requirements and contexts, but finds the ‘implementation of a commonly applied assessment practice very difficult, since each of its projects has its own priorities, time frames and levels of complexity’.

A	Programme staff agreed that both vertical and horizontal integration of competence are necessary ... They expressed caution regarding the difficulties of ensuring the assessment of this competence, especially in programmes which do not have an institutional base or are not able because of financial or human resource constraints to assess educators in the classroom.
B	The provider believes that the policy shift towards applied and integrated assessment practices is desirable and useful. However, it believes that this policy shift is feasible only if it is able to access more funds.
D	<i>Meaningful and reliable assessment through authentic assignments in an authentic context is almost impossible because one cannot reproduce the same situation for every student. Assessments drawn from different situations for every student are not fair, reliable or comparable.</i>
D	Some staff cited their own experience to argue that most colleges and schools do not have the management infrastructure to sustain a sufficiently high degree of internal communication to achieve reliability across individual staff and departments responsible for assessment. This implies that valid and reliable integrated assessment in authentic contexts may be unattainable in such institutions.
A	While the providers agreed that problem-solving assignments constitute a sound approach which could be implemented, they argued that facilitators would have

	to have access to the classroom in order to assess the degree to which the problem had actually been solved. This would require a total shift away from traditional norms in the assessment of assignments. Portfolio assessment, in their view, would be a minimum requirement in all teacher education programmes.
I	The programme members believe that whilst [vertical integration in] assessment is a good idea, it is very difficult to implement. [The non-government organisation] is, for instance, still grappling with problems related to the assessment of practical competence. Since one of the aims of the FDE is to improve management practice, the practical assessment of this has been found to be very subjective. It is thus very difficult to conclude a “pass” or “fail” based on subjectively observed behaviour. [One staff member] suggests that competence should be measured both as outputs and outcomes. Outputs could refer to things like written documents, whilst outcomes could refer to behavioural changes. The latter, which are in a sense equivalent to practical competence, are extremely difficult to measure.
I	Given the fact that in South Africa we come from a context where successful completion of a course is crucial to accessing a range of opportunities which are not otherwise available, there is a tendency for South African learners to get through the assessment process at all costs. Hence implementing assessment in an authentic context implies that there has to be a strong element of trust in the relationship between the learners and the “system”. Programme team members believe that the element of trust is missing in the relationship between programme providers and learners, and hence it is difficult to creatively combine summative assessment and formative development approaches in an authentic context.
E	At present there are no assessment criteria across courses, for example, Methods courses, Professional Studies or Education ... The course co-ordinators and HOD feel it is possible to assess this integration at the level of the research essay or in teaching practice but not across the modules ... Integration may take place across modules as a result of lecturer and student comments and through assessment task design, but it may not be possible to explicitly assess this.
B	The different components of [Programme B] make the implementation of a commonly applied assessment practice very difficult, since each of its projects has its own priorities, time frames and levels of complexity ... [Programme B] is involved in many different projects, and the specific requirements of a particular project (particularly in terms of time and resource constraints) may impede a holistic approach to programme practice.

**Programme A, which itself deals with the development of competence in assessment, made various points about the *Norms and Standards* recommendations regarding assessment policy in EDS programmes. They argued that:**

- ❑ **The report has missed an opportunity to ‘spearhead the transformation of assessment strategies’ by not giving a ‘clearer explication’ of various approaches to assessment, and in particular by not paying ‘sufficient attention to the nature of a sound continuous assessment policy’.**
- ❑ **The report may not have made ‘adequate provision for the very real problem of programmes appearing on the surface to meet policy requirements, [though they] fundamentally do not’.**
- ❑ **The report needs a ‘stronger emphasis on critical outcomes’.**
- ❑ **The report needs to address ‘the means whereby institutions would be enabled to comply with its requirements. They suggested, for example, that every education institution should have access to a trained assessor.’**

**Portfolio assessment should be a ‘minimum requirement in all teacher education programmes’.**

A	[Programme A] ... felt that a clearer explication of the various approaches to and the different forms of assessment is required. This they suggested would assist in the implementation of the policy on the ground ... The providers felt that the policy document has largely failed to give sufficient attention to the nature of a sound continuous assessment policy. The policy expects providers to follow such a policy, but it does not give this adequate attention in the document and the providers felt that it is missing an opportunity to spearhead the transformation of assessment strategies ... They referred to the way in which continuous assessment practices have been described in the policy and suggested that this approach has largely ignored the learner, although it is described as learner-centred practice. They questioned the absence of performance indicators and argued that the policy contained no guidelines on implementation.
A	The providers questioned whether the policy has made adequate provision for the very real problem of programmes appearing on the surface to meet policy requirements, but which fundamentally do not. It was agreed that the review of assessment practices would counter this problem, but the providers were not convinced that this would suffice.
A	The providers suggested that the policy document would be enhanced by a stronger emphasis on critical outcomes. They agreed these had been addressed, but felt that these outcomes needed to have been made more explicit.
A	The providers suggested that the policy needed to take account of the means whereby institutions would be enabled to comply with its requirements. They suggested, for example, that every education institution should have access to a trained assessor, and that policy makers need to include this aspect of implementation in the policy generation phase.
A	While the providers agreed that problem-solving assignments constitute a sound approach which could be implemented, they argued that facilitators would have to have access to the classroom in order to assess the degree to which the problem had actually been solved. This would require a total shift away from traditional norms in the assessment of assignments. Portfolio assessment, in their view, would be a minimum requirement in all teacher education programmes.

## PROVIDER-WORKPLACE LINKS

<p>Various programme providers referred to the difficulty of maintaining intense provider-workplace relationships, and the concomitant difficulty of integrating theory and practice:</p> <ul style="list-style-type: none"> <li>□ Programme B, which has very close contact with schools, referred to ‘resource constraints’ as ‘barriers to extensive and in-depth integration of theory and practice’.</li> <li>□ Two programmes mentioned logistical issues, such as workload distribution among staff and timetabling difficulties, as barriers in terms of the integration of content knowledge with teaching practice (Programme E), the programme’s capacity to offer teaching practice in a range of contexts (Programme E), and greater flexibility in the timing of teaching practice (Programme D).</li> </ul>	
B	<p>Although “teaching practice” as understood by the <i>Norms and Standards</i> report is not a component of the programme, the classroom support provided to teachers is a reflection of [Programme B’s] commitment to this ideal. However, the resource constraints ... are barriers to extensive and in-depth integration of theory and practice.</p>
E	<p>The expectation that teaching observation be integrated with content knowledge raises difficulties for the HDE because Methods lecturers would carry the bulk of the load for teaching practice supervision. Lecturers teaching Methods courses that are particularly popular, or targeted for increased recruitment, could end up having to see large numbers of students in a short space of time. In contexts where the recruitment of additional part-time or contract staff is becoming less possible, it is questionable whether such a strategy is workable.</p>
E	<p>The programme ... raises questions about the extent to which teachers can be assessed on their ability to teach in authentic and changing contexts and what it meant by it. In their context, the programme co-ordinators interpreted this to mean teaching in a range of contexts and raised the issue of whether teachers can or should be made to teach in different teaching contexts (geographical, racial, class and linguistic) when it involves travelling expenses. Other aspects of assessment, for example, case studies set in different contexts, and materials development tasks requiring the target group of learners to be specified, are ways of assessing for this competence.</p>
D	<p>While the <i>Norms and Standards</i> report does not stipulate any minimum time to be spent by aspirant educators in the workplace, it emphasises the need for the student to be given sufficient time and guided opportunities to develop the competences required of educators. Implicit in its observation that different students may develop those competences at different rates is the notion that EDS programmes should allow for flexible periods of teaching practice and other site-based activities. [Programme D] staff do not consider this to be feasible under the present circumstances ... Firstly, most schools do not have the managerial expertise or administrative infrastructure to accommodate flexible periods of teaching practice ... Secondly, the college itself commits virtually all its teaching staff to supporting the students in the classroom during periods of teaching practice. Arranging alternative programmes of directed study for some students who have been excused from teaching practice would present serious logistical problems.</p>

Various programme providers raised issues related to the provider-workplace relationship, sometimes with explicit implications for policy development:

- ❑ Programme E argued that the report ‘does not really address the issue of the quality of relationships with schools’, and that ‘the degree of schools’ involvement with students varies, as does the quality of their teaching experience’. They also recommend ‘assessing the extent to which teaching practice is not an add-on’ in educator development programmes.
- ❑ Programme A staff requested ‘stronger and clearer guidelines for teaching practice which higher education institutions should be required to follow’, and argued for the incorporation of a ‘structured internship’ as a policy requirement for entry into the profession. They extend this argument for *in situ* assessment to in-service programmes.
- ❑ Programme A propose that ‘teacher educators ... themselves need to retain their roles as practitioners’ and argued that ‘teacher educators should be located in the workplace ... [to] ensure that teaching practice is a much more integral part of the learning undertaken by student teachers’.

Programme J argued that ‘... *some of the in-service training providers a lot of times lack the theoretical parts, and the challenge is to get all three together. I believe that our point of departure must be to get all three components [professional, academic and occupational] in one course.*’

E	<i>Norms and Standards for Educators</i> does not really address the issue of the quality of relationships with schools. The programme co-ordinator pointed out that the degree of schools’ involvement with students varies, as does the quality of their teaching experience.
E	As <i>Norms and Standards for Educators</i> is looking towards quality assurance in teacher education it may be worth noting that assessing the extent to which teaching practice is not an add-on may require observations in addition to the types of documentary evidence required for this study.
A	The respondents believe that the new policy should provide stronger and clearer guidelines for teaching practice which higher education institutions should be required to follow ... Staff felt that the policy document should be more specific on the ways in which teacher educators should set up, maintain and improve their workplace linkages. They felt strongly that a process of structured internship should be incorporated into the policy, so that the teaching profession would only recognise an educator in future after a period of internship.
A	The providers agreed that the focus on applied and integrated assessment practices is sound, and stressed that any assessment of educators should be triangulated, with some degree of formalised assessment taking place in the educator’s classroom, the day-to-day situation of the teacher. Programme staff argued that if teacher education programmes did not incorporate assessment <i>in situ</i> , [their] value ... would be questionable. They thought that this should become a requirement of all teacher education programmes.
H	If the pre-service / in-service continuum is to be taken seriously, then the notion of teaching practice needs further interrogation. Does a qualified teacher not need ‘teaching practice’? Should a teacher upgrading his or her qualifications also expect to be assessed in the classroom? The <i>Norms and Standards for Educators</i> report does not answer these questions clearly for in-service programmes such as the UNP/SACTE B.Ed. programme.
A	It was suggested that teacher educators be linked to schools in an overt and interactive way and that they themselves need to retain their roles as practitioners ... Programme staff argued that teacher educators should be connected in a developmental and participatory way with the school curriculum and the needs of the workplace. It was strongly emphasised that teacher

	educators should be located in the workplace. This, in their view, would ensure that teaching practice is a much more integral part of the learning undertaken by student teachers.
J	<p>Other staff [asserted] the importance of integration of theory and practice:  <i>Some of the in-service training providers a lot of times lack the theoretical parts, and the challenge is to get all three together. I believe that our point of departure must be to get all three components [professional, academic and occupational] in one course.</i></p> <p>A conclusion that could be drawn from this is that the <i>Norms and Standards</i> is expecting the academic provider to do too much.</p>

## PROGRAMME DESIGN ISSUES

<p><b>Three programme providers referred to the difficulty of designing programmes inductively, based on research conducted among target learners:</b></p> <ul style="list-style-type: none"> <li>❑ Programme B referred to the resources required to conduct ‘intensive medium-term research ... amongst relevant stakeholders to develop a programme built from <i>‘the particular to the general’.</i>’</li> <li>❑ Programme B argued that its curriculum is ‘framed by the requirements of existing school syllabi and the specific outcomes stated for the different grades in Curriculum 2005’ and that it is difficult to ‘avoid imperatives that guide it towards developing a programme based on the immediate and direct needs of teachers’.</li> <li>❑ Programme D staff, though a research unit has been established, is ‘sceptical about the capacity of colleges of education to undertake much research’ because of ‘shortage of suitably qualified staff, coupled with a heavy load of teaching and administrative duties for staff best qualified to conduct research.’</li> </ul> <p>Programme E notes the <i>Norms and Standards for Educators</i> preference for a ‘design-down approach to programme design (proceeding from purpose to units)’, and the rationale for it. They argue, however, that ‘... in practice it is possible that ... [a design-up approach] is likely to occur in established programmes’. They attribute this to ‘a context of shrinking numbers of tenured posts [and] budget cuts’ which requires programmes such as theirs to be ‘shaped around the existing core of staff expertise’.</p>	
B	<p>Whilst [Programme B] attempts to design its programmes based on research conducted among target learners, it is not feasible for its programme to be developed purely on an inductive basis. The reason suggested by [one staff member] is that [Programme B] <i>does not have the time and resources to spend a year in different classrooms identifying the needs of its potential learners.</i> It believes that a “purely inductive” approach would imply that intensive medium-term research has to be conducted amongst relevant stakeholders to develop a programme built from <i>the particular to the general.</i></p>
B	<p>[Programme B] is framed by the requirements of existing school syllabi and the specific outcomes stated for the different grades in Curriculum 2005. Since the aim is to support teachers who are currently teaching science in schools, it is difficult to avoid imperatives that guide it towards developing a programme based on the immediate and direct needs of teachers. It is not therefore possible for [Programme B] to adopt a purely inductive approach to programme design.</p>
D	<p>Inductive programme design is ... seen as an ideal to which to aspire. However, in the prevailing economic climate, many [Programme D] staff are sceptical about the capacity of colleges of education to undertake much research. They</p>

	cite their own experience in support of their views. For reasons which most EDS institutions could relate to – namely, shortage of suitably qualified staff, coupled with a heavy load of teaching and administrative duties for staff best qualified to conduct research – [Programme D] has not yet been able to implement such a research programme ...
E	The <i>Norms and Standards for Educators</i> preference for a design-down approach to programme design (proceeding from purpose to units) is an attempt to avoid problems with coherence and depth that the Technical Committee envisages happening with a design-up approach. In practice it is possible that an approach that is more design-up than design-down is likely to occur in established programmes because of a number of constraints. When working with existing long-standing programmes in institutions, an issue for programme design is the existing expertise within an institution. In a context of shrinking numbers of tenured posts, budget cuts and struggles to keep posts open when staff members retire or leave, programmes such as the HDE are shaped around the existing core of staff expertise.

**Programme D raised the issue of formulae for the determination of staff complements at colleges, which has explicit implications for policy development. Staff argued that research is not ‘recognised – and therefore funded – by the Department of Education as a legitimate major-time activity for college lecturers’, and that research capacity can only be strengthened if staffing formulae are reviewed.**

D	For reasons which most EDS institutions could relate to – namely, shortage of suitably qualified staff, coupled with a heavy load of teaching and administrative duties for staff best qualified to conduct research – [Programme D] has not yet been able to implement such a research programme ... This highlights a need for national and provincial education authorities to review formulae for the determination of staff complements at colleges. Senior [Programme D] staff do not see research being recognised – and therefore funded – by the Department of Education as a legitimate major-time activity for college lecturers.
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## PROFESSIONALISM

**Programme E referred to opposing views of professionalism internationally. The ‘*highly internalised [notion of a] vocation of teaching*’, which incorporates the notion of a ‘*professional conscience*’, stands in contrast to the more legalistic ‘*civil service*’ approach, which is ‘*about being much more externally measurable and accountable*’. It was argued that, although ‘*you can’t simply graft on a little bit of [another] tradition*’, different ‘*ethical takes on Norms and Standards*’ should be possible.**

E	<i>In some places there is a highly internalised vocation of teaching. Teacher training is teacher education and aims to internalise a vocational conscience so that a person is highly driven to do the right thing – you can appeal to their professional conscience. In other places there is a civil service form of teacher professionalism – teachers see themselves as officials – more of a legalistic 9-5 mentality ... We are a mixed system [in South Africa]...We [the School of Education] see ourselves as trying to inculcate the internalised one. Outcomes are a civil service tool – it is about being much more externally measurable and accountable. That is why from the English system it is still greeted with some outrage because it appears to doubt the very tenet of their professionalism. You can’t simply graft on a little bit of that other tradition ... Although we support</i>
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	<i>the outcomes-based trend (because it is a way of pinning people down) you can have different ethical takes on Norms and Standards ... and they should have different ways of doing the same thing and measure which different ways work well</i>
<p><b>Several programme providers commented, from a policy perspective, on issues related to ‘extended professionalism’:</b></p> <ul style="list-style-type: none"> <li>❑ <b>Programme A staff noted that ‘involving the target group in programme curriculum development makes good design sense, not only in shaping the content and mode of delivery, but also in reinforcing ownership and professionalism’. They suggested, however, that ‘important paradigm shifts need to happen among the target group before this can become a requirement’.</b></li> <li>❑ <b>Programme A argued that for student-initiated activity (such as involvement in tutoring programmes) ‘to have any value for the students and others, it [needs] to contribute to the awarding of a qualification’.</b></li> </ul> <p><b>Programme C argued in favour of a greater emphasis in the <i>Norms and Standards for Educators</i> on ‘collaborative learning’.</b></p>	
A	The interviewees believe that involving the target group in programme curriculum development makes good design sense, not only in shaping the content and mode of delivery, but also in reinforcing ownership and professionalism ... [However,] staff agreed that it is possible to implement the use of learners in the design of programmes, but cautioned that important paradigm shifts need to happen among the target group before this can become a requirement. It was suggested that pilot groups could take on the task of developing this in phases so that familiarity with the issues and related tasks could develop over time.
A	The providers believe that student-initiated activity (in tutoring programmes, for example) is desirable; it is already being utilised by them in their teacher forums and proving worthwhile. They felt that this ought to be factored in as part of all learning programmes and cautioned against it merely being added on. They argued that for it to have any value for the students and others, it needed to contribute to the awarding of a qualification.
C	Collaborative learning is an important aspect of [Programme C] which does not seem to have the same emphasis in the <i>Norms and Standards</i> .

## RECOGNITION OF PRIOR LEARNING

<p>Various opinions were offered with respect to the recognition of prior learning:</p> <ul style="list-style-type: none"> <li>□ Programme A argued that flexible opportunities for ongoing professional development will ‘only work effectively once the formal recognition of prior learning, and the structures to enable this to happen, are in place’.</li> <li>□ Programme D has designed a means to assess students for entry purposes which replaces matriculation results, but has ‘not yet been able to make the recognition of prior learning workable <i>within</i> courses’.</li> </ul>	
<ul style="list-style-type: none"> <li>□ <b>Programme E admits students on alternative criteria, but says that ‘<i>we still haven't been radical in what we term prior learning ... we multiply the admission routes [but] we don't really recognise prior learning in any logically accountable way</i>’.</b></li> <li>□ <b>Programme E suggests that ‘[Norms and Standards] can expect institutions to be flexible about entry and be accountable about what they are doing, but people will have a different profile ... they have equivalent competence but they haven't got the same competence and the courses need to be sensitive to it.’</b></li> </ul> <p><b>Programme A cautioned that ‘RPL should not become an access issue only’. Staff argued that the <i>Norms and Standards for Educators</i> report should ‘provide much clearer procedural guidelines for the effective implementation of the recognition of prior learning’. They argue in favour of giving ‘more than academic credits’ and moving ‘towards the certification of learners perhaps solely on what they have achieved, both academically and non-academically, outside of an institution’.</b></p>	
A	Staff agreed that teacher education programmes should be flexible enough to offer practising teachers opportunities for ongoing professional development. They believed, though, that this would only work effectively once the formal recognition of prior learning, and the structures to enable this to happen, are in place.
D	[Programme D has been able to] recognise prior learning and with it, suitability for admission into the course, more effectively than traditional matric results through the use of well-researched selection instruments ... [However,] programme staff have not yet been able to make the recognition of prior learning workable <i>within</i> courses ...
E	<p>RPL also raises issues that <i>Norms and Standards for Educators</i> does not directly address. The HDE, like many other programmes, admits students on alternative criteria, but:</p> <p style="padding-left: 40px;"><i>we still haven't been radical in what we term prior learning ...</i> and <i>we multiply the admission routes; we don't really recognise prior learning in any logically accountable way ...</i></p> <p>In practice, [a staff member] argues, institutions are paying lip service to the notion of RPL. They are not assessing in terms of alternative routes to the same generic competence. Instead, they are focussing on alternative entry and multiplying the entry routes. His advice to <i>Norms and Standards for Educators</i> is not to be overambitious:</p> <p style="padding-left: 40px;"><i>[Norms and Standards] can expect institutions to be flexible about entry and be accountable about what they are doing, but people will have a different profile and they will come in and they will be different ... they have equivalent competence but they haven't got the same competence and the courses need to be sensitive to it.</i></p>
A	[The programme staff] believe that RPL will be able to assist in decisions

	<p>regarding access, as well as in deciding on placement within a programme. They cautioned that RPL should not become an access issue only. The <i>Norms and Standards for Educators</i> report, they believe, needs to provide much clearer procedural guidelines for the effective implementation of the recognition of prior learning. They suggest, for the process to be effective, that it requires a one-on-one assessment approach. They suggest the <i>Norms and Standards for Educators</i> report should move towards giving more than academic credits and should move towards the certification of learners perhaps solely on what they have achieved, both academically and non-academically, outside of an institution. They also suggested that the <i>Norms and Standards for Educators</i> policy document should guide providers on ways in which generic portfolios can be developed so that all work conducted by an individual teacher, even in occasional workshops, could be assessed and learning recognised.</p>
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## QUALITY ASSURANCE

<p><b>The Programme G case study generated the argument that a conceptual flaw in the <i>Norms and Standards for Educators</i> report is that ‘its focus is on inputs, in the form of systems and structures, rather than on outputs, in the form of what the programme ultimately produces in the form of learning in the classroom’. Staff argued that ‘evaluators of EDS programmes should not neglect schools and their learners in their search for evidence of quality’.</b></p>	
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D	<p>One lecturer argued that the examples of criteria for quality teacher education offered by the <i>Norms and Standards</i> report (1998:pp149-159) provide a useful breakdown of aspects and standards which an EDS institution or programme could consider as it attempts to develop a high-quality learning environment for its students. Yet its focus is on inputs, in the form of systems and structures, rather than on outputs, in the form of what the programme ultimately produces in the form of learning in the classroom ... Evaluators of EDS programmes should not neglect schools and their learners in their search for evidence of quality.</p>
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## DISTANCE EDUCATION ISSUES

<p><b>The issue of delivery mode, and particularly the effect of delivery mode on assessment strategies, was raised by several distance education providers:</b></p>	
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| <ul style="list-style-type: none"> <li>❑ <b>Programme G staff felt that the classroom-based observation of teachers is an ‘enormous undertaking’ in a large-scale national distance education programme.</b></li> <li>❑ <b>Programme I staff, also a national though smaller-scale programme, believes that ‘it can undertake classroom-based assessment only on a sample basis’. The team members suggested that ‘assessment in an authentic context can occur through other means – for example [through] case study reports, peer assessment, learner portfolios and diaries’.</b></li> <li>❑ <b>Programme J staff referred to logistical difficulties presented by the challenge of marking over 7000 assignments and examinations, as well as ‘the expense of additional assessment and providing feedback’.</b></li> </ul> |  |
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<p><b>Programme J staff argued that frequent course revision is also difficult in a distance education programme, because ‘... changes can only be done once a year – any more than this will disadvantage the student ... [because] we never know where the student is in terms of the course.’</b></p>	
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G	<p>[Programme G] staff believed the observation of teachers in their own classrooms – a strong <i>Norms and Standards</i> recommendation – was an “enormous undertaking”. Staff said that “we have students doing the</p>
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	programme throughout the country and to organise observing them on a continuous basis implies additional financial and human resources”. However, staff are open to this concept and are in the process of thinking how practice should be assessed ... Staff also “felt that the <i>Norms and Standards</i> report is written in the context of face-to-face provision of teacher educators. In a distance education context classroom observation is very daunting”.
I	Whilst the programme team agrees that assessment in an authentic context (namely school-based assessment) is desirable and useful, they believe that such a practice cannot be sustainable in the long term. The experience of the programme has been that classroom-based assessment needs a great deal of resources in order to be sustained. The Wits FDE has on an average about 140 students enrolled annually, from all over the country (many of them in rural areas), and the University believes that it can undertake classroom-based assessment only on a sample basis. The team members agree, though, that assessment in an authentic context can occur through other means – for example [through] case study reports, peer assessment, learner portfolios and diaries.
J	The staff made repeated comments about the fact that the [large-scale distance education] delivery mode constrains the implementation of applied and integrated assessment ... Staff mentioned logistical factors like the sheer pressure of large student numbers (close on 7 000 assignments and examinations to be marked annually across the five courses in the programme); the fact that learners are full-time teaching staff dispersed all over the country; and, generally, staff workload. Staff also commented on the expense of additional assessment and providing feedback.
J	With regard to cycles of course review, the programme staff expressed the opinion that frequent revisions could not be done in a distance education context. As one staff member put it: <i>Changes can only be done once a year – any more than this will disadvantage the student. The point at which changes are instituted is crucial - We never know where the student is in terms of the course, so timing is crucial.</i>
<b>Reflecting in their case study report on the difficulties of the distance education providers, particularly in terms of applied and integrated assessment, Welch and van Voore (1999) suggest that ‘the academic provider and the employer [should] collaborate in the delivery of a qualification’, and that ‘an obvious point of collaboration would be on assessment of performance in the workplace through the developmental appraisal system’.</b>	
... To expect the academic provider to provide all dimensions of a qualification – including assessment in the workplace - might be desirable, but not feasible. What would perhaps be feasible is to expect the academic provider and the employer to collaborate in the delivery of a qualification. An obvious point of collaboration would be on assessment of performance in the workplace through the developmental appraisal system. The district would organize practical developmental appraisal of management competence, and the provider would contribute the dimension of academic recording of applied competence through assignments and examinations. The teacher would then have a portfolio containing evidence of both the workplace and academic dimensions of his competence.	

# CHAPTER EIGHT

## FINDINGS OF THE CROSS-CASE CRITIQUE OF THE *NORMS AND STANDARDS FOR EDUCATORS REPORT*

### INTRODUCTION

This Chapter sets out the findings of the cross-case analysis of the various strands of critique of *Norms and Standards for Educators* that emerged in the case studies.

### GENERAL POLICY ISSUES

[N1](#) Generally, programme providers engaged in a positive way with the recommendations of *Norms and Standards for Educators*. Programme A explicitly welcomed the *Norms and Standards for Educators* report, as it provides a ‘model which can be followed’ in terms of roles and competences. The integration of theory and practice, and the proposed strengthening of linkages between providers and schools, were ‘viewed as an extremely positive feature of the policy’. Programme F also ‘found the conceptual shifts underlying the assessment practices in the *Norms and Standards for Educators* report easy to understand, useful and desirable’.

[N2](#) A number of general criticisms emerged in this process regarding the process and style of policy formulation. Programme C felt that ‘policy making is increasingly top down, and heavily reliant on experts who are removed from the coalface’, and criticised the language of the report as ‘*inaccessible*’. Programme E argued that the document is ‘written for the Department of Education’ and expressed a need for ‘better implementation documents pitched at course developers and administrators’. Programme I pointed out that ‘the conceptual shifts on which this study is based are not laid out as such in the *Norms and Standards for Educators* report’.

[N3](#) Other general criticisms related to substantive features of the *Norms and Standards for Educators* report:

- Programme E suggested that there are ‘implications for flexible admission and RPL [recognition of prior learning] that *Norms and Standards for Educators* does not address’, and that the report ‘*doesn’t deal with the whole sociological story of massifying higher education – increasing diversity*’ for which ‘*lecture rooms are not prepared*’.
- Programme I suggested that the concept of notional learning hours might be ‘abused both by learners and providers’, especially in the absence of ETQAs.
- Programme E mentioned the difficulty of ensuring ‘representivity of the course team in relation to race, gender, geographic location and experience’, given the current freezing of posts and budget cuts. They suggested that providers might be monitored against a five- or ten-year institutional plan, on the basis of current staff profiles and projections.

[N4](#) Programme D, by developing close links between its in- and pre-service programmes, seems to have found a model for the integrated development of competence, and for the development of ‘extended professionalism’.

### CONTEXT AND SYSTEM ISSUES

[N5](#) Several programmes alluded to the difficulty of working in a system which is ‘inimical to change’:

- ❑ Programme D argued against a ‘*steady state*’ approach and in favour of a ‘transitional period wherein the historical realities of inequality and disadvantage are recognised and accommodated’.
- ❑ Programme I argued that ‘guidelines [are needed] on how to deal with the current reality of teachers who have the same formal qualifications, but widely disparate competences’.
- ❑ Programme D argued that ‘*too much [evidence of progress] is being expected too soon*’ with respect to innovative programmes.

**N6** Programme I highlighted the emphasis which the *Norms and Standards for Educators* report places on individual competence ‘while ignoring the question of systems change’. Staff argued that ‘whilst the thrust of the country’s education management development policy is about changing both individuals and organisations, the NQF, SAQA and *Norms and Standards for Educators* are concerned only about changing individuals’. They cautioned against a ‘greater paper chase (albeit a more relevant one), than exists in the country presently’. They specifically argued that the modularisation of qualifications, though useful for learners, ‘does not promote much-needed links between educator development and school change and transformation’.

## COLLABORATION AMONG EDS PROVIDERS

**N7** Two programmes made, explicitly and implicitly, reference to issues of collaboration which are absent in the *Norms and Standards for Educators* report:

- ❑ Programme E referred to the ‘greater regional dialogue and planning’ which is encouraged by the Higher Education Bill.
- ❑ Programme J made the point that ‘*the report is written from the perspective of the employer, whereas the university needs to look at the academic training needs of the teacher*’, cautioning that ‘... we must be very careful not to expect the same kind of results as the in-service trainer which has the hands-on requirements and opportunities. We cannot get the same results.’

## EQUIVALENCE AMONG EDS PROGRAMMES

**N8** Two programmes referred, explicitly and implicitly, to the problem of equivalence in the accreditation of educator development.

- ❑ Programme D, which is currently negotiating for its mathematics, science and technology courses to be recognised as credits towards degrees, argued that ‘universities tend to be rather jealous of their statutory power to confer degrees and are sometimes reluctant to accredit other providers’ courses towards a whole degree offered by the university’.
- ❑ Programme C, which as an in-service programme has adopted a strategy of formative multi-mode assessment, suggested that ‘the assessment practices in the *Norms and Standards* seem to be geared to PRESET programmes and for qualification purposes’.

## COMPETENCE

**N9** A number of conceptual difficulties were raised with respect to general notions of competence and knowledge:

- ❑ Programme C ‘argued that The *Norms and Standards* report seems silent on the process of knowledge generation ... through a process of sharing, inquiry and reflection’.
- ❑ Programme I staff questioned whether ‘there exists a notion of partial competence, and whether it is possible, for example, for an individual to have ‘*half a competence*’. According to [a programme team member], somebody is either competent or not, and there are no fractional measures.’

- ❑ Programme I expressed concern about the concept of modularisation, and ‘whether assessment based on individual modules could effectively measure competences identified across a course as a whole.’ Programme I argued that ‘modularisation does not really achieve what it sets out to do because it restricts the horizontal integration of assessment’.
- ❑ Programme I staff also argued that horizontally integrated assessment across educator roles would be ‘*extremely complex*’ if a student ‘*could begin a course, drop it in the middle (after receiving several credits), then pick it up again after several years*’.
- ❑ In contrast to Programme I, Programme E (which does not define exit level outcomes for the qualification as a whole) argued that outcomes can only be effectively defined at the level of modules. They expressed concern about ‘expressing both outcomes and assessment criteria ... at *too high a level of abstraction* ... In general, staff consulted felt it is appropriate to assess and stipulate outcomes at module level or at course level for the teaching practice component of School Experience where there are concrete skills that can be assessed’.

**N10** A number of difficulties were raised with respect to the feasibility of the approach to integrated competence which is outlined in the *Norms and Standards for Educators* report:

- ❑ Programme D staff referred to difficulties with the development of reflexive competence, arguing that ‘it is extremely difficult to develop such higher-order cognitive skills in students upon whom so much time must be spent in providing content input and developing practical and foundational competences’.
- ❑ Programme D staff point to ‘evidence that the progressive classroom practice which most students are able to demonstrate during observation lessons may not be sustained over time or when the students do not feel that their performance is being assessed’.
- ❑ Programme J staff refer to the learning paradigm that students are accustomed to: ‘*We found in the beginning that students are not familiar with this way of work; they would simply read the book and want to [regurgitate] what they’ve read and that would mean that I can now pass the exam, but when it comes to applying that knowledge they found it very difficult to master ...*’. This is interpreted by the case study researchers as a caution that a major shift towards the development of applied and integrated competence needs to be introduced gradually.

**N11** Two programme providers raise contrasting problems relating to the notion of foundational competence:

- ❑ Programme B argues for a more focused approach to ‘*hard core science teaching support*’, suggesting that roles other than the specialist role may be desirable but ‘not feasible in the current context owing mainly to time and financial constraints’.
- ❑ Programme E, conversely, assumes that the learning area specialism has been adequately dealt with through undergraduate disciplinary study, and argues that ‘*Norms and Standards for Educators* seems to focus more on INSET when it stresses the development of adequate foundational competence [but] ... does not speak to the issues that arise in ‘capping’ diplomas ...’.

## EDUCATOR ROLES

**N12** Various programme providers raised difficulties with the conceptualisation of educator roles:

- ❑ Programme A made a strong case for the incorporation of the ‘assessment specialisation as a necessary component of all educator development programmes’.
- ❑ Programme B staff argued that ‘the concept of phase specialist is of vital importance’, adding that EDS programmes need to ‘address what is possible, in terms of children’s ability to learn, in each of the different school phases’.

- ❑ Programme B is highly critical of the ‘designer’ role, suggesting that this ‘*could lead to a misplaced notion that teachers should become textbook writers*’, which is ‘*neither feasible nor appropriate*’.
- ❑ With respect to the ‘lifelong learning’ role, Programme B suggested that ‘the concept of a *scholarly approach* may be more appropriate, since the intention is not to change the vocation of teachers to that of scholars.’
- ❑ Programme I, a management development programme, argued that ‘the *Norms and Standards* ... appears to understand the specialist role more as a subject or phase specialism, than as a career path within one of the other roles’.
- ❑ Programme I staff requested clarity regarding ‘how the other roles are to be integrated with the specialist management role in the case of Education Management qualifications’.

**N13** Also with respect to the conceptualisation of educator roles, Programme E ‘expressed reservations about the foregrounding of roles ... and some confusion about how they are expected to work with them in practice’. Programme E staff:

- ❑ did not feel that hours could be attached to the educator roles in the form of credits; and
- ❑ requested an indication of what kinds of courses, content areas, and modes of delivery can help to achieve these [educator] roles.

## ASSESSMENT ISSUES

**N14** Doubts and concerns regarding the feasibility of applied and integrated assessment were raised by several providers:

- ❑ Programmes A and B refer to ‘financial and human resource constraints’ with regard to classroom-based assessment.
- ❑ Programme D staff argued that assessment in an authentic school context creates difficulties at the level of reliability and comparability, and that ‘most colleges and schools do not have the management infrastructure to sustain a sufficiently high degree of internal communication to achieve reliability across individual staff and departments responsible for assessment’.
- ❑ Programme A staff argued that ‘problem-solving assignments constitute a sound approach which could be implemented, [but] ... argued that facilitators would have to have access to the classroom in order to assess the degree to which the problem had actually been solved.’
- ❑ Programme I argued that the observation of practical competence is ‘very subjective’, and that such competence is therefore ‘extremely difficult to measure’.
- ❑ Programme I argued that ‘successful completion of a course is crucial to accessing a range of opportunities which are not otherwise available’, and that therefore ‘... there is a tendency for South African learners to get through the assessment process at all costs. Hence implementing assessment in an authentic context implies that there has to be a strong element of trust in the relationship between the learners and the “system”. Programme team members believe that the element of trust is missing ...’
- ❑ Programme E suggested that applied and integrated assessment is possible ‘at the level of the research essay or in teaching practice but not across the modules ... Integration may take place across modules as a result of lecturer and student comments and through assessment task design, but it may not be possible to explicitly assess this.’
- ❑ Finally, Programme B, like Programme A, is able to tailor its programmes to different requirements and contexts, but finds the ‘implementation of a commonly-applied assessment practice very difficult, since each of its projects has its own priorities, time frames and levels of complexity’.



[N15](#) Programme A, which itself deals with the development of competence in assessment, made various points about the *Norms and Standards* recommendations regarding assessment policy in EDS programmes. They argued that:

- ❑ The report has missed an opportunity to ‘spearhead the transformation of assessment strategies’ by not giving a ‘clearer explication’ of various approaches to assessment, and in particular by not paying ‘sufficient attention to the nature of a sound continuous assessment policy’.
- ❑ The report may not have made ‘adequate provision for the very real problem of programmes appearing on the surface to meet policy requirements, [though they] fundamentally do not’.
- ❑ The report needs a ‘stronger emphasis on critical outcomes’.
- ❑ The report needs to address ‘the means whereby institutions would be enabled to comply with its requirements. They suggested, for example, that every education institution should have access to a trained assessor.’
- ❑ Portfolio assessment should be a ‘minimum requirement in all teacher education programmes’.

## PROVIDER-WORKPLACE LINKS

[N16](#) Various programme providers referred to the difficulty of maintaining intense provider-workplace relationships, and the concomitant difficulty of integrating theory and practice:

- ❑ Programme B, which has very close contact with schools, referred to ‘resource constraints’ as ‘barriers to extensive and in-depth integration of theory and practice’.
- ❑ Two programmes mentioned logistical issues, such as workload distribution among staff and timetabling difficulties, as barriers in terms of the integration of content knowledge with teaching practice (Programme E), the programme’s capacity to offer teaching practice in a range of contexts (Programme E), and greater flexibility in the timing of teaching practice (Programme D).

[N17](#) Various programme providers raised issues related to the provider-workplace relationship, sometimes with explicit implications for policy development:

- ❑ Programme E argued that the report ‘does not really address the issue of the quality of relationships with schools’, and that ‘the degree of schools’ involvement with students varies, as does the quality of their teaching experience’. They also recommend ‘assessing the extent to which teaching practice is not an add-on’ in educator development programmes.
- ❑ Programme A staff requested ‘stronger and clearer guidelines for teaching practice which higher education institutions should be required to follow’, and argued for the incorporation of a ‘structured internship’ as a policy requirement for entry into the profession. They extend this argument for in situ assessment to in-service programmes.
- ❑ Programme A propose that ‘teacher educators ... themselves need to retain their roles as practitioners’ and argued that ‘teacher educators should be located in the workplace ... [to] ensure that teaching practice is a much more integral part of the learning undertaken by student teachers’.
- ❑ Programme J argued that ‘... some of the in-service training providers a lot of times lack the theoretical parts, and the challenge is to get all three together. I believe that our point of departure must be to get all three components [professional, academic and occupational] in one course.’

## PROGRAMME DESIGN ISSUES

[N18](#) Three programme providers referred to the difficulty of designing programmes inductively, based on research conducted among target learners:

- ❑ Programme B referred to the resources required to conduct ‘intensive medium-term research ... amongst relevant stakeholders to develop a programme built from ‘the particular to the general’.’
- ❑ Programme B argued that its curriculum is ‘framed by the requirements of existing school syllabi and the specific outcomes stated for the different grades in Curriculum 2005’ and that it is difficult to ‘avoid imperatives that guide it towards developing a programme based on the immediate and direct needs of teachers’.
- ❑ Programme D staff, though a research unit has been established, is ‘sceptical about the capacity of colleges of education to undertake much research’ because of ‘shortage of suitably qualified staff, coupled with a heavy load of teaching and administrative duties for staff best qualified to conduct research.’
- ❑ Programme E notes the *Norms and Standards for Educators* preference for a ‘design-down approach to programme design (proceeding from purpose to units)’, and the rationale for it. They argue, however, that ‘... in practice it is possible that ... [a design-up approach] is likely to occur in established programmes’. They attribute this to ‘a context of shrinking numbers of tenured posts [and] budget cuts’ which requires programmes such as theirs to be ‘shaped around the existing core of staff expertise’.

[N19](#) Programme D raised the issue of formulae for the determination of staff complements at colleges, which has explicit implications for policy development. Staff argued that research is not ‘recognised – and therefore funded – by the Department of Education as a legitimate major-time activity for college lecturers’, and that research capacity can only be strengthened if staffing formulae are reviewed.

## PROFESSIONALISM

[N20](#) Programme E referred to opposing views of professionalism internationally. The ‘highly internalised [notion of a] vocation of teaching’, which incorporates the notion of a ‘*professional conscience*’, stands in contrast to the more legalistic ‘*civil service*’ approach, which is ‘*about being much more externally measurable and accountable*’. It was argued that, although ‘*you can’t simply graft on a little bit of [another] tradition*’, different ‘*ethical takes on Norms and Standards*’ should be possible.

[N21](#) Several programme providers commented, from a policy perspective, on issues related to ‘extended professionalism’:

- ❑ Programme A staff noted that ‘involving the target group in programme curriculum development makes good design sense, not only in shaping the content and mode of delivery, but also in reinforcing ownership and professionalism’. They suggested, however, that ‘important paradigm shifts need to happen among the target group before this can become a requirement’.
- ❑ Programme A argued that for student-initiated activity (such as involvement in tutoring programmes) ‘to have any value for the students and others, it [needs] to contribute to the awarding of a qualification’.
- ❑ Programme C argued in favour of a greater emphasis in the *Norms and Standards for Educators* on ‘collaborative learning’.

## RECOGNITION OF PRIOR LEARNING

[N22](#) Various opinions were offered with respect to the recognition of prior learning:

- ❑ *Programme A argued that flexible opportunities for ongoing professional development will ‘only work effectively once the formal recognition of prior learning, and the structures to enable this to happen, are in place’.*
- ❑ *Programme D has designed a means to assess students for entry purposes which replaces matriculation results, but has ‘not yet been able to make the recognition of prior learning workable within courses’.*
- ❑ Programme E admits students on alternative criteria, but says that *‘we still haven't been radical in what we term prior learning ... we multiply the admission routes [but] we don't really recognise prior learning in any logically accountable way’.*
- ❑ Programme E suggests that *‘[Norms and Standards] can expect institutions to be flexible about entry and be accountable about what they are doing, but people will have a different profile ... they have equivalent competence but they haven't got the same competence and the courses need to be sensitive to it.’*
- ❑ Programme A cautioned that *‘RPL should not become an access issue only’.* Staff argued that the *Norms and Standards for Educators* report should *‘provide much clearer procedural guidelines for the effective implementation of the recognition of prior learning’.* They argue in favour of giving *‘more than academic credits’* and moving *‘towards the certification of learners perhaps solely on what they have achieved, both academically and non-academically, outside of an institution’.*

## QUALITY ASSURANCE

[N23](#) The Programme G case study generated the argument that a conceptual flaw in the *Norms and Standards for Educators* report is that *‘its focus is on inputs, in the form of systems and structures, rather than on outputs, in the form of what the programme ultimately produces in the form of learning in the classroom’.* Staff argued that *‘evaluators of EDS programmes should not neglect schools and their learners in their search for evidence of quality’.*

## DISTANCE EDUCATION ISSUES

[N24](#) The issue of delivery mode, and particularly the effect of delivery mode on assessment strategies, was raised by several distance education providers:

- ❑ Programme G staff felt that the classroom-based observation of teachers is an *‘enormous undertaking’* in a large-scale national distance education programme.
- ❑ Programme I staff, also a national though smaller-scale programme, believes that *‘it can undertake classroom-based assessment only on a sample basis’.* The team members suggested that *‘assessment in an authentic context can occur through other means – for example [through] case study reports, peer assessment, learner portfolios and diaries’.*
- ❑ Programme J staff referred to logistical difficulties presented by the challenge of marking over 7000 assignments and examinations, as well as *‘the expense of additional assessment and providing feedback’.*
- ❑ Programme J staff argued that frequent course revision is also difficult in a distance education programme, because *‘... changes can only be done once a year – any more than this will disadvantage the student ... [because] we never know where the student is in terms of the course.’*

[N25](#) Reflecting in their case study report on the difficulties of the distance education providers, particularly in terms of applied and integrated assessment, Welch and van Voore (1999) suggest that *‘the academic provider and the employer [should] collaborate in the delivery of a qualification’*, and that *‘an obvious point of collaboration would be on assessment of performance in the workplace through the developmental appraisal system’.*

# CHAPTER NINE

## RECOMMENDATIONS

### ACKNOWLEDGMENT

I would like to thank Professor Ben Parker of the University of Natal in Pietermaritzburg for his substantive contribution to this Chapter, much of which is his own original work.

### INTRODUCTION

This Chapter analyses issues that have emerged from the literature review (see Chapter Three), and the description and analysis of the ten case studies (see Chapters Four to Eight, and particularly the analyses presented in Chapters Six and Eight). Discussions which have taken place in various research team workshops and Project Reference Group meetings are also taken into account. This approach enables the formulation of some overarching perceptions of the strengths and weaknesses of the *Norms and Standards for Educators* (NSE) report (Department of Education, September 1998). It also enables some observations regarding current provision in South Africa of educator development and support (EDS).

The analysis begins with some observations arising from the research methodology, and proceeds by looking at some of the key issues and concerns regarding the strengths and weaknesses of the NSE report that arose in a number of the case studies, and which were further discussed at a Technical Support Team meeting on 15 March 1999 and with the Project Reference Group on 29 March 1999. This leads to the tentative explication of key strategic 'policy and implementation issues', and the presentation of recommendations, that emerge from the findings of Chapters Six and Eight.

The case studies are descriptions of existing EDS programmes. They exist in a context of policy transformation, in which the National Qualification Framework (NQF), the South African Qualification Authority (SAQA), the Education, Training and Development Practices (ETDP) Project, the work of the Committee on Teacher Education Policy (COTEP) and the NSE report are key structures and processes. If the process of transformation is to be taken forward, then the 'implementation issues' set out later in this Chapter will have to be addressed.

### THE RESEARCH METHODOLOGY

The sample of ten EDS providers included a range of institutions, organisations and modes of delivery:

- ❑ A University/College of Education (part-time, in-service, distance education) Bachelor of Education (NQF level 7)
- ❑ A University (part-time, in-service, distance education) Bachelor of Primary Education (NQF Level 7)
- ❑ A University/private provider (part-time, in-service) Further Diploma in Education (NQF Level 6)
- ❑ A University/NGO (part-time, in-service) Further Diploma in Education (NQF Level 6)
- ❑ A University (full-time, pre-service) Higher Diploma in Education (NQF Level 6)
- ❑ A College of Education (full-time, pre-service) Higher Diploma in Education (NQF Level 6)

- ❑ A College of Education (part-time, in-service, distance education) Higher Diploma in Education (NQF Level 6)
- ❑ A non-governmental (non-accredited, in-service) programme in assessment practices
- ❑ A non-governmental (non-accredited, in-service) programme in science teaching
- ❑ A provincial intergovernmental (non-accredited, in-service) educator development programme

The fieldwork generated a rich description of this very diverse range of programmes. In their descriptions of the programmes, the researchers avoided evaluative judgements as a necessary methodological procedure, as few providers would have been willing to engage in an evaluative exercise without a longer timeline and a greater investment of resources. The decision to adopt a descriptive rather than an evaluative approach was also a means to achieve a sharper focus on the NSE report. This precluded the gathering of any objectively verifiable information on the quality of the programmes reviewed. Instead, the analysis of the programmes was closely based on seven key conceptual shifts in the NSE report (see Chapter Two), which were identified by the research team on the basis of the literature review (Ota, 1999) and subsequent discussions. It is around these seven shifts that the researchers mapped convergences and divergences in the programmes with respect to the NSE proposals. This sharp focus on the policy process as the prime subject (or, in a way, the central ‘case study’) generated a rich range of analysed issues which relate to conceptual difficulties and NSE implementation challenges. It also enabled a strongly focussed account of providers’ responses to the NSE report. These issues and responses will be a valuable input into the policy process.

It should be noted, however, that this approach was adopted at the expense of a more organic approach to the case studies, which might have allowed for a more formative and evaluative exercise, as well as a more objective focus on EDS provider strategies. As it stands, the ten case studies tell us more about the NSE report than they do about the providers or programmes. However, it is possible to use information from the case studies, interpreted through the prism provided by the analysis of cross-cutting issues of convergence and divergence, to make conjectures about key implementation strategies that would promote convergence and thereby nurture the implementation and evolution of the NSE report. Broadly, the case studies show that these providers would not object to the implementation of the NSE report, provided that key barriers set out under ‘policy and implementation issues’ below are addressed.

## **GENERAL REACTIONS TO THE NSE REPORT**

Though the diversity of EDS programmes in the sample affected the relevance of the NSE report for any specific provider, certain general observations are possible. For example, the NSE report was seen by some programme teams as emphasising pre-service, full-time whole qualifications and being most relevant to Higher Education providers. This perception notwithstanding, there was a generally positive approach to the NSE report conditional on certain key issues being addressed. Of particular concern is the lack of clarity with regard to the status of the NSE report in terms of EDS policy. A related concern is the absence of fully functional National Standards Bodies (NSBs), Standards Generating Bodies (SGBs) and Education and Training Quality Assurers (ETQAs). The legislation and implementation of new norms and standards for teacher education qualifications is an urgent necessity if they are to be taken seriously by providers.

It should be noted, however, that while there seemed to be a general awareness of the impact of an outcomes-based NQF and the importance of new norms and standards for educators, only a few programme teams were thoroughly familiar with the whole of the NSE report, as well as related documents such as the Education, Training and Development Practices (ETDP) final

report, the Department of Education (DoE) job descriptions and the Education Labour Relations Council (ELRC) developmental appraisal criteria. There is an awareness of the NQF, SAQA and Curriculum 2005 debates relating to outcomes-based education, and there is a tentative familiarity with the language contained in the relevant documents. However, interviewees generally expressed a lack of detailed and concrete knowledge of what was expected of them by the NSE report. The language of the report, though it is broadly the language of SAQA and the NQF, is seen as technical, complex, difficult to understand, and subject to differing interpretations. The different understandings of what is meant by competence are of particular importance, as they are directly linked to the kinds of assessment practices used by EDS providers. This confirmed the need, articulated in the report, for a follow-up handbook for providers which makes accessible the technical terms, the definitions and the conceptual framework contained in the report.

However, amongst those who were acquainted with the NSE report, important criticisms are to be found among the generally favourable reactions. For example, the policy process was criticised as being conducted at several steps removed from on-the-ground practice. From a more substantive perspective, the lack of clear implementation guidelines for key aspects of the report, such as assessment and teaching practice, is noted by several providers. The 'civil service' approach to 'outcomes-based professionalism' is raised as an issue for debate by a programme which has adopted a more 'conscientising' approach to professional development. The perceived looseness of the concept of notional hours of study, linked with the absence of ETQAs to monitor abuse of notional time allocations, was also mentioned. One programme voiced concerns that representivity (in terms of gender and race, for example) among EDS programme staff should be a staged, long-term expectation.

Linked to this notion of staged transformation, a number of programme teams referred to important contextual and systemic factors which militate against effective EDS provision. One programme team argued that the NSE report should propose transitional strategies for transformation, rather than adopting a 'steady state' approach. Another fundamental critique of the report is that it addresses individual competence at the expense of systems change, or at least some attention to the difficulties an individual educator may face in a sometimes 'inimical' school environment. One programme team highlighted, as another contextual factor requiring transitional strategies, the widely differing competences of educators who have the same qualification levels.

At the structural heart of the NSE report is the framework of educator roles and competences, and the notions of applied, vertical and horizontal integration of competence. A broadly favourable reaction to this framework among providers is circumscribed by a concern that there is a tendency towards 'generic' outcomes for teacher education. The point was made that generic outcomes which operate at the level of a whole qualification cannot provide the specialised and contextualised outcomes associated with a module of a whole qualification, or a unit standard. It is these more specialised and contextualised outcomes that can be 'mapped onto' assessment criteria or performance indicators, as opposed to the more generic outcomes associated with whole qualifications which cannot be 'translated into' assessment criteria. The inherent danger of a 'generic' tendency is that it may lead to a lack of depth in a specialised learning area, or discipline. Conversely, another programme team argued that the modularisation of programmes militates against integration of competences and across educator roles.

Several providers referred to the lack of detailed prescriptions or guidelines within the NSE report. This was less a matter of choice and more a consequence of new legislation and emerging practices within the national and provincial departments of education and within other sectors of the Education, Training and Development field. The NSE report sits uncomfortably on the

borders between the Department of Education and the Department of Labour, and between the state and other roleplayers – especially statutory bodies such as SAQA, the ELRC, SACE, CHE and the National Skills Authority (NSA). The NSE report is focussed primarily on norms for qualifications for state-employed educators – those requirements, prescribed by the Department of Education, which all qualifications wishing to be recognised and evaluated for employment in public education must meet. In the NSE report these qualification norms are described using roles and competences. The NSE also suggests to SAQA (and its NSBs, SGBs and ETQAs), the CHE and its Higher Education Quality Committee (HEQC), and the NSA (and its Sector Education and Training Authorities (SETAs)) that the qualification framework described for normative purposes by the Department of Education may well resemble or at least link to the standards proposed by other stakeholders for the registration and evaluation of programmes (Unit Standards, Unit Standards Based Qualifications and Whole Qualifications) and providers. The possibility of such a systemic approach to the education of educators is made possible by ‘common usages’ or ‘family resemblances’ in the ways in which roles and competences can be used to describe criteria, or indicators, for job descriptions and performance management, for codes of conduct, for standards for quality assurance, for exit level outcomes of qualifications and assessment criteria for learning programmes. This approach is made problematic by the diverse, often conflicting, interpretations given to roles and competences, and more generally, to the purposes of the NQF. Roles and competences can be used for occupational grading or performance management; developmental appraisal; the development and regulation of professional conduct through a code; the design, development, delivery and evaluation of learning programmes; the assessment of learners and the quality assurance of qualifications; and as guidelines for research.

These and other difficulties will be referred to again below under ‘implementation issues’. Generally, providers feel that the NSE report, together with other Department of Education and SAQA documents, satisfies the symbolic and legislative/procedural purposes of policy, but does not address sufficiently the practical challenges of implementation. Hence the strong focus on implementation strategies which emerges from the interplay of convergences and divergences between the ten case studies and the NSE. The research, by interrogating the alignment of present practices with the NSE report, shows what kinds of practical problems would arise if the report, or some evolved version thereof, were implemented.

## **POLICY AND IMPLEMENTATION ISSUES**

### **Challenges in Conceptualisation and Implementation**

The data show clearly that convergence and divergence with the NSE report do not translate simply or directly into ‘good’ or ‘bad’ teacher education. Rather, responses in the interviews show that providers are critically self-reflective and, in the main, offer sensible, empirically grounded, explanations for what they are doing. So, when practices differ from the NSE proposals, one can usually find, within the case studies, a reason why implementation of the NSE report poses challenges. This opens up the possibility of looking at the case studies more generally as sources of information about the practical barriers in EDS which most concern the providers, and as a basis for recommendations to address these barriers.

Barriers aside, the strategic objectives implied in the NSE report’s seven conceptual shifts appear to be broadly affirmed by the providers interviewed in the case studies. There are, however, a number of cross-cutting issues and concerns that arise from the studies. Broadly, there is a concern that these ‘strategic objectives’ or ‘ideals’ will be difficult to achieve in practice. Major

challenges of policy and implementation which have emerged through the research are presented below, together with recommendations for EDS policy and guidelines. The eighteen recommendations are presented in bold, but should not be read in isolation from the argument which precedes them. The arguments themselves are derived from the findings set out in Chapters Six and Eight. To facilitate cross-referencing, relevant findings are referred to (for example, 8N1 is finding N1 in Chapter 8) at the end of each recommendation. [If you are working with the hyperlinked version of this report, you can left-click on the reference number to visit the relevant section of the findings. To return, left-click the 'back' arrow on your web toolbar.]

## Educator Roles and Competences

**R1** Providers experience difficulties in designing and constructing learning programmes which integrate and apply all three competences: practical, foundational and reflexive (vertical integration). Within each of the proposed educator roles, the applied competence to be developed and assessed is described as consisting of these three kinds of competence (by SAQA, the ETDP report and the NSE report). While generally seen as a potentially useful distinction, there is concern about an epistemological gap in the conception of knowledge provided in the NSE. While there are various models of knowledge that have currency in South African debates, there is a broad tendency to typologise knowledge by splitting it into its component parts. Hence, 'subject' knowledge may be linked to, and distinguished from, 'pedagogic' knowledge. Or, distinctions may be drawn between 'procedural' knowledge, 'strategic' knowledge, 'content' knowledge and 'conceptual' knowledge. **The NSE report does not provide a clear account of knowledge, and EDS policy or guidelines therefore need to define in greater depth and detail the tripartite distinction of 'applied competence'.**

[6C4](#) [6C5](#) [8N9](#)

**R2** There is a particular lack of focus in the NSE roles and competences on learning area knowledge. This is compounded by a lack of clarity in regard to the specialist role and the modality of its integration with the other roles (horizontal integration). Broadly, the NSE report argues for the specialist role being closely aligned with the purpose of a qualification and 'containing' the other more generic, contextual roles. What is not clear to providers is how the balance and mix of roles and competences will be determined by them – what are the parameters within which they must operate? In addition, there are some ambiguities: how, for example, does one construct a Further Diploma in Education at NQF level 6 in which the specialist role is one of the contextual roles (such as 'manager', or 'designer of learning programmes')? **Clarity is needed in EDS policy or guidelines on the notion of the specialist role (particularly in relation to learning area knowledge), and its integration with other roles.**

[6C2](#) [6C3](#) [6C6](#) [6C9](#) [8N9](#) [8N10](#) [8N11](#)

**R3** The role of specialist knowledge in the three learning programmes that make up the foundation phase (Grade 1 to 3) can easily be marginalised by a more generic focus on educator roles. A consequence of this approach may be that foundation phase teachers who are reflexive mediators of learning lack foundational and practical mathematical knowledge which underlies numeracy and mathematical literacy, and hence are unable to 'teach' the subject knowledge that underpins that learning programme. **EDS policy or guidelines should therefore spell out clearly the extent to which foundation phase programmes should address discipline-specific knowledge.**

[6C2](#) [8N11](#)

**R4** The six educator roles arguably represent, across the case studies, the aspect of the NSE



report which is most distant from the reality of EDS practice. There is no sense in which any provider consciously or formally addresses the roles as they are set out in the report. For example, no provider structures its learning programme on the proposed framework of roles, and those who gave it some thought immediately found it difficult to imagine credit-awarding strategies, and appropriate allocations of notional time. Some qualification-bearing programmes do not, for example, have a specialism, which places the NSE report in a real-world dilemma because of its emphasis on the design of programmes around this role. An indication of the extent of the problem may be found in paragraph R2 above, in the simple example given of a Further Diploma in Education based on the specialist career path of school management, which is set out in the NSE report as a contextual role rather than a specialism. This immediately raises the issue of career pathing as a silent, or at least rather hidden, component in the framework. An approach which foregrounds career paths rather than, or at least in addition to, educator roles would certainly have some real-world virtue. At the level of the programmes we have studied, it is much easier to map both the qualification-bearing and the non-qualification programmes onto career choices. Programme A, for example, explicitly refers to school-based assessors, though it does not explicitly refer to the assessment specialism as a career path. It is easy to imagine, though, how assessment could be a career path, even in the inherited system with its emphasis on summative examinations. Programme B addresses the needs of primary science teachers, another obvious career path. Programme E, most ambitiously among the programmes reviewed, refers broadly to the preparation of its students for ‘knowledge professions’. Programmes I and J develop school management competence. Another obvious career path, though it is ironically one for which very little provision is made in EDS programmes, is that of teacher educator, with clear opportunities in terms of institutional location in colleges, universities, non-government organisations and the departments of education – and, if innovative steps are taken in this direction, in schools and across clusters of schools. From the perspective of the departments of education, the foregrounding of the career component also makes sense, since the departments (especially the support services) tend to be structured around the ‘career spaces’ of educators – for example, the foundation phase, or support for learners with barriers to learning, or school management – and would therefore find it easy to relate to programme providers who are similarly orientated. **The Department of Education, in its EDS policy, should consider foregrounding the notion of educator career paths rather than, or at least in addition to, the notion of educator roles.**

[6C6](#) [8N12](#) [8N13](#)

**R5** The questioning of the epistemological bases of the NSE – and more generally of South Africa’s outcomes-based NQF – promotes an ethos of ongoing development of norms and standards for educators. But it also points to a question that needs to be addressed more thoroughly – what knowledges are being promoted through the NQF? Are these appropriate? Are they relevant? A more radical criticism (raised at the Reference Group workshop of 29 March 1999) was that the whole enterprise of constructing an outcomes-based NQF should be revisited. Or, at least, careful attention should be paid by regulatory bodies to the dangers of outcomes becoming overly focussed on non-disciplinary curricula in which the competences acquired by the learner overemphasise practical and reflexive competences to the detriment of foundational competences. This strategic criticism was linked to a more general operational concern about the difficulty of taking the NSE roles and competences and integrating them or ‘turning them into’ content (of, for example, sciences, mathematics, history, or music). In order to enable the translation of roles and competences into learning programmes, **EDS policy or guidelines should set out much clearer and more detailed indicators of requisite discipline-based knowledge.**

[6C2](#) [6C3](#) [8N11](#)

**R6** Two of the hardest outcomes to achieve appear to be vertical and horizontal integration.

Horizontal integration because most qualifications are divided by subject department loyalties or other institutional factors (including the formation of provider partnerships) that result in inhibited integration of the roles and competences across modules. And vertical integration because of the complexities involved in integrating foundational, practical, and reflexive competences. This is particularly so with regard to subject content. **EDS policy or guidelines need to be clearer as to how roles and competences can be mapped onto subject content.**

[8N12](#) [8N13](#)

**R7** Regulative difficulties are an inevitable part of moving from an ‘in-put’ to an ‘out-come’ approach to qualifications. The NSE restricts itself to providing a broad conceptual framework and generic outcomes for qualifications as the parameters for providers. These leave the design of programmes through which learners can achieve these outcomes to the discretion of providers within a system of stakeholder and roleplayer regulation. The prominent ‘regulatory roleplayers’ within teacher education include the Department of Education, SAQA, the ELRC, the Council on Higher Education (CHE), the National Skills Authority (NSA), teacher unions, critical interest groups, non-government organisations (NGOs) and for-profit providers. There is a danger that such a complex system of regulation involving so many roleplayers will tend to operate at a very general, vague and ambiguous level in its descriptions of outcomes-based roles and competences with an emphasis on generic roles and competences. While a generic approach may be broadly suitable for the foundation and intermediate phases, this may not be an appropriate approach for the more specialist learning areas of the senior phase and the FET band. In addition, the need for specialisms in educational management, finance, administration, human resource development, programme development, quality assurance, assessment, human rights, LSEN, among other possible specialisms, will be obscured. **In EDS policy or guidelines, a balance therefore needs to be struck between a generic approach to competence (with relative concomitant freedom for providers) and more detailed guidelines or prescriptions, particularly with regard to specialisms.**

[6C9](#) [8N9](#)

**R8** The programmes generally experience difficulty in addressing all three forms of applied competence, and in utilising applied and integrated modes of assessment. With notable exceptions, reflexive competences seem to be inadequately addressed, either in the disciplinary roots of a subject or in the underpinning knowledge for contextualised or specialised roles. There was a tendency to understand reflexive competences as ‘being reflective’ - capturing only one aspect of reflexivity. Also, formal *in situ* assessment of educators in their classrooms, again with notable exceptions, is a weak or absent component in several programmes, often because of cost factors. The lack of attention in some programmes to practical competence, which relates closely to the integration of theory and practice, often hinges on the presence or absence of powerful provider-workplace linkages. **EDS policy therefore needs to address as a major strategic issue the nature, and the intensity, of relationships between providers, departments of education and schools, particularly inasmuch as these relationships can be brought to bear on the improvement of assessment practices.**

[6C7](#) [6C8](#) [6C13](#) [8N14](#) [8N16](#)

## Quality Assurance

**R9** Despite general agreement on the use of a framework of roles and competences, there is a general concern regarding the lack of a nationally regulated quality assurance system for providers and learning programmes linked to new forms of state registration and subsidy. Also, one provider argued that the NSE report’s focus in terms of quality assurance is, paradoxically, on

'inputs' by the provider into the process of generating quality, in the form of quality assurance systems and structures. This focus, the provider argued, is at the expense of outputs, in the form of what the programme ultimately produces as evidence of quality improvement in learning in the classroom. This viewpoint is supported indirectly by the research, which found that the assessment emphases and practices in several programmes constitute a major divergence with respect to the NSE report and NQF principles generally. **The Department of Education therefore needs to work in close conjunction with SAQA to ensure that a feasible, output-oriented system of quality assurance is designed and implemented, and that state registration and subsidy of programmes becomes a driving factor in improving quality in EDS.**

[6C12](#) [8N23](#)

## Programme Design Issues

*R10* The NSE lays great emphasis on the importance of developing qualifications and learning programmes with specific purposes that are grounded in research. A serious concern that has emerged in reflection on the case studies is, however, the lack of research into schools, classrooms and other learning sites which should be informing the design and development of learning programmes. There is little school or classroom research taking place in South Africa, apart from the recent President's Education Initiative (managed by the Teacher Development Centre of the Department of Education and the Joint Education Trust). Where research is conducted in universities, it tends to be divorced from the design and delivery of learning programmes. Among other providers, research approaches are often informal. **EDS policy should include clearer guidelines with regard to the role of research and the way it should inform the design and delivery of learning programmes, as well as how it will be driven by strategically earmarked funding.**

[6C10](#) [6C11](#) [8N18](#) [8N19](#)

## Professionalism

*R11* Almost all of the programmes have a range of strategies to develop what this Project has referred to as 'extended professionalism'. The encouragement of critical engagement and reflective thinking, the promotion of learning lifestyles, the involvement of learners in the design of their own programmes, and other evidence of innovative approaches to professional development can be found in the case studies. Such activity, however, even when it is relatively formalised, is not always credit-bearing within a qualification. South Africa is, according to one provider, adopting an 'outcomes-based, civil service' approach to professionalism. Such an approach should not be at the expense of a more 'conscientising' strategy which emphasises the vocational. **However, the Department should note that greater clarity is needed in EDS policy and guidelines on what is meant by 'extended professionalism', as well as on ways in which it might be rewarded.**

[6C15](#) [8N20](#) [8N21](#)

## Equivalence and the Recognition of Prior Learning

*R12* The notion of 'equivalence' was raised in various ways in the case studies. At one level, this refers to the inherited profile of a teacher population among whom similar qualifications do not equate with similar competence. This is clearly a recognition of prior learning issue which

works in two directions: a relevant qualification cannot be construed as guaranteeing competence, and its lack cannot be used to justify an assumption of incompetence. In this sense, the relevant education qualification value (REQV) framework is arguably little more than a cosmetic readjustment of historical injustices. Three programmes explicitly criticised, and were also self-critical, of the current approach to the recognition of prior learning (RPL) among educators, which is arguably most aptly described as ‘lip service’. Each of these programme teams cautioned against viewing RPL as an access issue only, which might multiply admission routes without fundamentally affecting students’ opportunities for exemption within the programme, or even from the programme of study altogether. **The Department of Education, in its EDS policy, needs to address the key NQF principle of recognition of prior learning in its capacity as an employer of educators who may variously be competent but underqualified, or qualified but undercompetent; the Department should also consider exercising its influence as a major roleplayer in the arena of admissions to and credits within qualification-bearing programmes.**

[8N3](#) [8N22](#)

***R13*** At another level, the notion of ‘equivalence’ operates across provider institutions, to the extent that the recognition by one institution of the modules or programmes of another is currently a question of private contract, rather than an issue of public interest. The Department of Education, however, has a vested interest in the growing network of arguably unsystematised agreements regarding equivalence. **As a major roleplayer in the arena of educator qualifications, the Department should consider playing a more active role in the multiple negotiations that are taking place between provider institutions around recognition of modules and programmes, particularly across the boundary between institutions which are firmly located in higher education and those which are not.**

[8N8](#)

## Conceptual Challenges

***R14*** The desire of SAQA for the NQF to enhance portability through the use of modularisation and unit standards adds to the challenges created by a holistic and integrated approach to teacher education. If the NSE desire for a holistic and ‘design-down’ approach to learning programmes and qualifications is to be realised, there will have to be far greater co-ordination among the various roleplayers. **The Department should promote close co-operation between SAQA, the relevant SETAs, the ELRC, SACE, the CHE (particularly its HEQC) and EDS providers, over the rules and criteria that govern registration of qualifications with SAQA, the quality assurance of EDS programmes, and their recognition and evaluation by the Department of Education.**

[8N9](#)

***R15*** There is a strong tendency within the NSE to favour occupational considerations (the skills needed to do the job) at the expense of academic and professional considerations (the knowledge and values required by the job). Given that the occupational in education has a strong bureaucratic dimension, there is a tension between a ‘technical/bureaucratic’ approach which is likely to emphasise practical competences and an ‘academic/professional’ approach which will tend to emphasise the foundational and reflexive competences – particularly with regard to the foundational and disciplinary dimensions of subject and pedagogic knowledge. An atomistic approach using modularisation and unit standards in a design-up approach is likely to favour a ‘bureaucratic’ approach to the implementation of norms and standards for educators. This will be in strong contrast to the ethos or culture of the providers in the case studies whose primary

orientation is towards an academic and/or professional focus. An ‘academic/professional’ approach, conversely, may result in qualifications which, in the worst case, do not improve occupational performance, or in which practical competence is not thoroughly assessed. **The Department, in its EDS policy, should give serious consideration to a strategy of co-operation among providers, and between providers and the departments of education, which best supports a holistic approach to the development of educator competence.**

[8N9](#) [8N20](#)

**R16** The bias of the NSE report towards full-time pre-service whole qualifications has led to a lack of discussion of the linkages between qualifications and employment in the Department of Education, particularly in regard to career and salary progression. Similarly neglected are the relationships between the roles and competences of the NSE report, and similar archetypes contained in ELRC, Department of Education and SACE policies. The dangers of these lacunae lie in their potential to stimulate a general systemic failure to implement the changes described in the strategic objectives. **The Department should consider designing and implementing an overarching policy process which integrates career, qualifications, professional development and appraisal issues, and, amongst other possible benefits, maximises the opportunities for leverage to drive, attune, reshape and improve EDS provision.**

[8N8](#)

## Implementation Issues

**R17** Whether or not the tendency of the NSE report is ‘bureaucratic’, roles and competences are central to the working of the proposed approach. The lack of epistemological clarity about the roles and competences is compounded by insufficient attention to the practical, financial and logistical difficulties of providing learning programmes that offer continuous, formative, integrated and applied assessments capable of ensuring that the required practical, foundational and reflexive competences have been achieved in a contextualised and specialised manner. The NSE commitment to an integrated and applied approach to competence and assessment is clearly the greatest hurdle for compliance. Most providers find this difficult in one way or another, especially with regard to school-based observational assessment, though some programmes have developed creative alternatives. The mode of delivery has a strong influence on compliance in this regard, with three of the distance education programmes particularly affected. This, however, is an issue that goes, like many others in this research, beyond the scope of the NSE report and strikes at the heart of the NQF itself. Put simply, applied competence is a requirement, and therefore the assessment of applied competence is a precondition, for the awarding of a qualification. Conversely, the simple logic of the NQF suggests that a programme which does not assess applied competence cannot be qualification-bearing. While for qualification purposes it is the responsibility of SAQA to implement this logic, for the purposes of recognition of qualifications for employment the Department of Education has a clear mandate to ensure that the qualifications obtained by its educators (and prospective educators) have more than symbolic significance. Pragmatic significance would be rooted in the extent to which the quality of education is likely to be improved through a qualification-bearing programme, and this is directly linked to the assessment of applied competence. A distance education programme with limited resources but several thousand learners may, if well managed, have advantages of scale and economy, and possible disadvantages in terms of the pragmatic significance of the qualification awarded. The Department cannot require the impossible – for example, that such a provider conduct school-based assessment for all learners with its current resources. **The Department should, however, examine carefully a range of possibilities for strategic collaboration with providers to ensure that its own resources (human, material and financial) are brought to**

**bear on the challenge of applied, workplace-based assessment, and design and implement a radical re-arrangement, and/or increase, of teacher education funding to EDS programmes, including universities, technikons and colleges of education.**

[8N10](#) [8N14](#) [8N16](#) [8N18](#) [8N24](#)

***R18*** One reason why qualification-bearing programmes are not addressing all of the proposed NSE requirements is that providers are still bound by existing policy (the 1996 COTEP Norms and Standards for Teacher Education and the Evaluation of Qualifications for Employment in Education), and by patterns of funding (which contain significant amounts earmarked for college of education pre-service programmes). **A clear policy on norms and standards for educators, which indicates immediate as well as long-term requirements and which is supported by guidelines for implementation, should be promulgated at the earliest possible opportunity; it must be noted, however, that such a policy must carry with it, at various key stages of implementation, appropriate reallocations of resources (notably but not only in terms of EDS funding).**

[8N10](#) [8N14](#) [8N16](#) [8N18](#) [8N24](#)

## CONCLUSION

The focus of this Chapter has been on issues that are likely to arise if the NSE report, or some evolved version of the report, is implemented as policy. This gives some idea of the strengths and weaknesses of the NSE report as a policy document; equally importantly, it shows a way forward for EDS practice. The NSE report is an attempt to show how to implement the outcomes-based principles of the NQF in close alignment with the ETDP project and other policy initiatives. If EDS is to develop within the principles and frameworks of an outcomes-based NQF, then the issues outlined above must be addressed.

It is important to remind ourselves that in each of the ten case studies the subject of the study is a programme that is actually operating, though in some cases under resource constraints which are threatening the programme's existence. It is important to remember also the many references to an 'inimical' system in which the programmes operate, features of which are the lack of receptiveness to change in many schools, and the widely disparate competences of teachers trained in a historically fragmented and unequal dispensation. One programme team, in this regard, noted that the *Norms and Standards for Educators* is about individual rather than systems change, and questioned such an approach.

As can be seen from the earlier chapters, however, there is much that is positive in what these programmes offer educators, including in some cases school-based and departmental managers. There is also a healthy diversity of approaches and a rigorous examination of issues. With each of the seven strategic objectives, providers showed a familiarity with and understanding of the underlying issues. Providers do think about, and try to address, the development of applied competence, the integration of theory and practice, their assessment practices, programme design and redevelopment issues, quality assurance, professionalism and workplace linkages. In Chapter Five particularly, there is ample evidence of diverse approaches and of reflection on these approaches. On the whole, although there are major challenges facing EDS, there is also a lot of hard work, research and development taking place, and there are high quality programmes, provided by committed professionals, available to educators. This gives one hope that South Africa may have a reservoir of institutional capacity and human resources that is able to address the challenges.

The research has gone some way towards defining these multiple challenges that face the EDS field. It has raised warning signals regarding our lack of a clear definition of 'knowledge' – in particular, the lack of clarity on the importance of learning area or disciplinary knowledge, on which clear messages are needed from the Department of Education. Another major set of challenges appears to be conceptual but is actually, crucially, related to implementation. These, in a nutshell, concern the relationships between theory and practice, between the symbolic and pragmatic significance of qualifications, between the development of applied and integrated competence and our ability to assess it, and, most fundamentally and practically, between the provider and the workplace. It is in this last dimension of the challenge that the Department is best placed to act.

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# **ANNEXURE A: RESEARCH SAMPLE**

## EDS Project – Sample

	Case A	Case B	Case C	Case D	Case E	Case F	Case G	Case H	Case I	Case J	Mol-teno Project (Pilot)	Wits FDE (English) (Pilot)
<b>Urban/rural</b>	R/U	R/U	R	R	U	R	R/U	R/U	R/U	R/U	R/U	R/U
<b>Location</b>	NCape, but program also offered elsewhere	NAT	ECape	NProv	WCape	ECape	NAT	KZN	NAT	NAT	NAT	NAT
<b>Mode of delivery</b>	C	C	CAS	C	C	DE	DE	DE	DE	DE	C	DE
<b>Type of provider</b>	NGO	NGO	Partnership	Public- and foreign-funded college	University	University	College	University	Partnership (University and NGO)	Partnership (University and private sector)	NGO	University
<b>Whole qualification or unit standard</b>	U	U	U	W	W	W	W	W	W	W	U	W
<b>Level</b>	5/6	5/6	5/6	5/6	5/6	5/6	5/6	7	6	6	5/6	6
<b>Topic</b>	Assessment of learners	Science	Whole school development (Primary)	Maths, science and technology	General	General – Primary	General – Primary	General	School management	School management	Language – Primary	English
<b>Size</b>	Small groups at a time	Small groups at a time	500 educators	131	90	1000	299	750	100	3500	Small	Small groups at a time

## KEY TO TABLE

C	Contact mode
CAS	Cascade strategy
DE	Distance education mode
NAT	Programme offered nationally
NGO	Non-government organisation
P	Programme offered in partnership
R	Rural coverage
R/U	Rural/urban coverage
U	Length of programme is possibly adaptable to a unit standard
W	Whole qualification

# ANNEXURE B: RESEARCH INSTRUMENTS

This document sets out the research instruments derived from:

- ❑ the 15 October 1998 Research Design Workshop and subsequent comment, including the Technical Support Team comments of 29 October and a meeting of the pilot fieldworkers on 7 November;
- ❑ workshops with researchers held on 12 and 13 January 1999 (literature review and pilot case study discussions); and
- ❑ subsequent work by John Gultig to implement the decisions with regard to analytical categories taken at the workshop on 13 January 1999.

These instruments were used by all researchers in the ten case studies conducted between January and March 1999.

Please note that Section 1 of Instrument 6.3, the whole of Instrument 6.4 and the whole of Instrument 6.5 are essentially the same framework. Each of these instruments sets out the seven key conceptual shifts of the *Norms and Standards for Educators* report. These three instruments did, however, serve different purposes (eg interviewing the programme team, as opposed to conducting the 'convergence analysis') and therefore each is slightly reformulated in terms of these purposes.

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## **INSTRUMENT 6.1: PHASE 1 (OPENING MEETING)**

## **Phase 1: Opening Meeting Schedule**

The following issues should be addressed in the opening meeting:

- ❑ description of the purpose of the project;
- ❑ outline of project activities;
- ❑ questions for clarification;
- ❑ general discussion of the value of the project, with equal emphasis on the fieldworker's part on the possible gains for EDS programmes and the development of the standards-generating process; and
- ❑ agreement should be reached on what constitutes key programme documentation.

## **INSTRUMENT 6.2: PHASES 2, 3, 4 AND 5 (PROGRAMME DESCRIPTION)**

## Section One: Group Interview 1 – Interview Schedule

- 1 What is your programme trying to achieve?
- 2 Why are you trying to do this?
- 3 Describe the total programme experience that your students go through.
- 4 Why are you trying to do it in this way?
- 5 Do you think this is the best way of doing it? Is there, in your opinion, a ‘better way’ that is not possible in your circumstances?
- 6 How do you know whether the programme is successful or not?
- 7 How did you go about designing the programme?
- 8 How do you go about redesigning and improving the programme?
- 9 What are the main features of the programme that lead to success / failure?

## Section 2: Review of Programme Documentation

### Suggested programme documentation to request

Programme brochures  
Programme descriptions  
Course (‘unit of learning’) descriptions  
Programme prospectus  
Reading lists  
Programme fees  
Programme budgets (eg expenditure on library resources)

Learning resources (at least a sample chosen by the provider)  
Description of what other resources are available (eg library)

Assessment system (including moderation practices)  
Assessment exemplars (eg examination papers, marking memoranda, marked scripts, assignments, assessments of observation and observation instruments)

The review of programme documentation should include at least the following nine aspects (which will also provide the heading framework for Part Three of the Case Study Report):

- ❑ **description of programme mission statement and goals;**  
[Some programmes may not have a defined mission statement, but the published goals may be enough and can be added to by reference to other documentation. However, it would be a good idea to also describe these goals in terms of the exit level outcomes which have been derived from a range of sources, and not simply the published goals. It might also be advisable to consider the role each of the different course components (materials, assessment, teaching and learning methods) is playing in the realisation of the goals/outcomes.]
- ❑ **description of target groups of learners;**  
[The description of target learners should not be exhaustive, but programme staff should be able to give us information about learning assumed to be in place and articulation possibilities. RPL issues would have to be dealt with, if they exist, in this section.]
- ❑ **purpose of qualification, or purpose of potential qualification;**



[A possible source of further information on this topic would be funding proposals, or programme proposals made to academic authorities.]

- ❑ **design and structure of the qualification or potential qualification;**  
[See boxes on pp28-31 (for Unit Standards) and pp31-32 (for Whole Qualifications) of the *Norms and Standards for Educators* report – and please exclude ‘Purpose of qualification’, which has been dealt with in the previous bullet. Please note that if a programme cannot supply explicit statements of exit level outcomes, they should describe (and we should tease out by whatever means) these outcomes.]
- ❑ **curriculum (materials, activities) of the programme;**  
[The course materials and activities should be reviewed in close conjunction with the assessment practices, to the extent that assessment is the ‘lens’ through which we view the curriculum.]
- ❑ **description of delivery mode;**
- ❑ **description of assessment practices and exemplars;**
- ❑ **description of learner support systems; and**
- ❑ **description of quality assurance system.**

### **Section 3: Group Interview 2 – Interview Schedule**

Present the draft programme description and check the completeness and accuracy of Phase 3 description. At the end of Group Interview 2, agree upon a deadline for comment (and presentation of further data) if necessary.

**OR**

Send the draft programme description two days before Group Interview 2, and suggest that the interview itself is a last opportunity for the programme team to check the completeness and accuracy of the Phase 3 description.

## **INSTRUMENT 6.3: PHASE 6 (GROUP INTERVIEW 3)**

NOTE TO RESEARCHERS:

PLEASE ENSURE THAT THE PROGRAMME TEAM RECEIVES THIS SCHEDULE TWO DAYS PRIOR TO GROUP INTERVIEW 3 TO FACILITATE PREPARATION.

## Phase 6: Group Interview 3 – Interview Schedule

### Section One: Discussion of the *Norms and Standards for Educators* report

The *Norms and Standards for Educators* report contains seven key conceptual shifts in policy on educator development. In each case, we would like to ask you:

- 1 How do you understand the shift?
- 2 Is it, in your opinion, a useful concept?
- 3 Is the shift desirable?
- 4 Is the shift feasible in your programme context?
- 5 Have you operationalised, or tried to operationalise, the shift in your programme, and if so how?

The key shifts are:

1. **The *Norms and Standards for Educators* report suggests that the assessment practices of an EDS programme must be applied and integrated.**
  - A programme should assess whether learners are able to integrate (*horizontally*) the knowledge and skills delivered through the different courses/modules (and roles) which make up the teacher development programme.
  - A programme should assess whether learners are able to integrate (*vertically*) the ability to perform important teaching actions competently (a practical competence), understand the theoretical basis for these actions (foundational competence), and reflect on and make changes to teaching practices (reflective competence) so that they can be described as achieving an applied and integrated competence.
  - The assessment strategy should assess the extent to which learners have the ability *to teach in authentic and changing South African contexts*.
  - Assessment should be *ongoing and developmental*.
2. **The *Norms and Standards for Educators* report suggests that EDS programme practices must develop in teachers an applied and integrated teaching competence.**
  - The teaching and learning strategy of a programme should develop both horizontal and vertical integration, as well as authentic application.
  - A programme should make links between the different courses/modules, and between different roles, which make up the teacher development programme.
3. **The *Norms and Standards for Educators* report suggests that EDS programmes should develop teachers' 'subject knowledge' and 'phase knowledge' – the 'specialist role'.**

- ❑ Subject knowledge teaching should be an integral part of the rest of the programme, and should not be an ‘add-on’. The contextual roles should be integrated into the ‘subject knowledge’ or ‘specialist’ role. Also, teaching observation should be integrated with content knowledge taught.
- 4. The *Norms and Standards for Educators* report suggests that programmes should be conceptualised and delivered in a manner which integrates theory and practice, and strengthens provider-workplace linkages.**
- ❑ A programme should work closely with schools in order to develop learner skills.
  - ❑ Teaching practice should be linked to the rest of the programme, and students should be well prepared for it. Teaching practice, again, should be integral to the programme and not an ‘add-on’.
  - ❑ Training should be contextually sensitive.
- 5. The *Norms and Standards for Educators* report suggests that EDS programmes – and the programme ethos – should develop teachers as extended professionals and lifelong learners.**
- ❑ Learners, for example, might be involved in programme design and implementation, either formally (for example through decision-making structures) or informally (for example, by making decisions regarding the nature of their assignments).
  - ❑ Student-initiated activity (like involving themselves in tutoring schemes) might be recognised towards the qualification.
  - ❑ A programme should offer possibilities for ongoing professional development. To this end, delivery should be flexible enough to allow practising teachers to attend.
  - ❑ Assignments should be designed to encourage problem-solving within authentic contexts.
  - ❑ A programme should prioritise *and teach* critical engagement, reasoning and reflective thinking.
  - ❑ A programme should ground teaching in a wider social, economic and political understanding and awareness.
  - ❑ Programme staff might be involved in policy-making and/or other social development activity outside of their mainstream activity.
  - ❑ A programme should develop an ethos which actively encourages lifelong learning and ongoing professional development. How does the institution handle recognition of prior learning (RPL)? Does the institution actively recruit in-service learners? (Note whether these are for discrete courses or whether the provider has attempted to run courses that are flexible enough to accommodate both in-service and pre-service students on the same course - see Section 8 of the NSE report.)

**6. The *Norms and Standards for Educators* report suggests that EDS programme providers should demonstrate characteristics that are likely to make them a self-improving, a learning organisation.**

- An EDS provider should have a system of course and staff review.
- An EDS provider should keep – and use purposefully - records of learners.

**7. The *Norms and Standards for Educators* report suggests that an EDS provider should adopt inductive rather than deductive approaches to programme design.**

- An EDS programme should be designed on the basis of research, and some or all of this research should be conducted among target learners. Conversely, a programme should not be designed through a deductive ‘desktop’ exercise.

## **Section Two: Discussion of principles of programme improvement**

**8. One fundamental purpose of the *Norms and Standards for Educators* report is to provide a framework for the improvement of EDS programmes. Please, therefore, consider and discuss the following:**

- What have you concluded (if anything) as a programme team about ways in which the programme could develop? Please consider at least the following:
  - the programme mission statement and goals;
  - target groups of learners;
  - purpose of qualification, or purpose of potential qualification;
  - design and structure of the qualification or potential qualification;
  - curriculum (materials, activities) of the programme;
  - delivery mode;
  - assessment practices;
  - learner support systems; and
  - quality assurance systems.

## **Section Three: Discussion of policy refinement and improvement**

**9. The *Norms and Standards for Educators* report and other key documents are open to refinement and improvement over time. Please, therefore, consider and discuss the following:**

- What do you recommend as a programme team in terms of the future development of policy for educator development and support? Consider at least the *Norms and Standards for Educators* report, and include if you wish:
  - the *SACE Code of Conduct*;
  - the *Developmental Appraisal Manual*; and
  - the *Duties and Responsibilities of Educators* agreement.

**INSTRUMENT 6.4: PHASE 7 ('CONVERGENCE' ANALYSIS  
FRAMEWORK)**

# Phase 7: ‘Convergence’ Analysis Framework

## Introduction

Outcomes-based education strategies are by definition concerned with assessing whether intended outcomes have been attained, and in their application in South Africa it is a concern that there should be an integration of assessment practices into the teaching and learning process. Consequently, the research approach of this project will be to focus on the *assessment practices* of providers, in the anticipation that it is this aspect of the programmes that will yield the greatest amount of useful data.

But, while a careful analysis of assessment practices is likely to reveal a good deal about the nature of the provider’s programmes, researchers will supplement this data with specific research on seven key conceptual shifts which new policy will require from providers. Consequently we suggest the following seven areas as key analytical clusters for Part Four of the Case Study Report.

### 1. To what degree, and in what ways, are the assessment practices of the programme applied and integrated?

- Explain how the assessment strategy of the programme assesses the extent to which learners have achieved the *horizontal integration* spoken of in the NSE report. In other words, explain how the programme assesses whether learners are able to integrate the knowledge and skills delivered through the different courses/modules (and roles) which make up the teacher development programme.

Probes: Describe the different assessment components. What are their respective weightings? How are the different roles assessed through subject specialism? How explicit are links to qualification purpose and roles? Who is involved in planning and implementing assessment procedures? How is this done?

- Explain how the assessment strategy assesses the extent to which learners have achieved the *vertical integration* spoken of in the NSE report. In other words, explain how the programme assesses whether learners are able to integrate the ability to perform important teaching actions competently (a practical competence), understand the theoretical basis for these actions (foundational competence), and reflect on and make changes to teaching practices (reflective competence) so that they can be described as achieving an applied and integrated competence.

Probes: Describe the different assessment components and strategies. What are their respective weightings? (See NSE report for ‘mix’ of strategies assumed as necessary. Check weighting of, for instance, written vs observational; within written check problem-posing/case-study based vs traditional essay; within observational check degree to which learner does own assessment before feedback and/or whether assessment is against a set of criteria, etc). How explicit are links to qualification purpose and roles? Who is involved in planning and implementing assessment procedures? How is this done?).

- Explain how the assessment strategy assesses the extent to which learners have the ability *to teach in authentic and changing South African contexts*.

Probes: Describe the different assessment components and strategies. What are their respective weightings? (School-based/school-focused vs provider-situated; case study, micro-teaching, quality of feedback?) Nature of links with schools (Informal, formal, role of school-based teachers)? Lecturer experience of work site? (Are they former teachers? Do they spend time in schools? How much? Nature of research?) Recruitment strategies? (Do staff reflect SA context in terms of race, gender, geographic location, experience?)

- ❑ Is assessment *ongoing and developmental*?

Probes: Explain how the programme balances assessment of discrete competence - like subject knowledge - with integrated competence - like the ability to teach. Explain how the programme understands and uses summative and formative forms of assessment. How is assessment weighted through the programme?

## **2. Are the educational practices of the provider likely to develop in teachers an applied and integrated teaching competence?**

- ❑ What does the programme understand by an ‘applied and integrated competence’? How does it link with the purpose of the qualification? (Probe in relation to ‘commonsense’ and NSE understandings.)
- ❑ How does the programme develop this competence? (Probe information from assessment answers. Probe both horizontal & vertical integration & authentic application. Probe how curriculum design proceeds: from purpose or technically as per the NSE report, probe difficulties in design, who designs, how and when, what autonomy do individuals have).
- ❑ Explain how the programme makes links between the different courses/modules, and between different roles, which make up the teacher development programme. (Is it through lecturer/course material comments? Or complete course integration? Or integration at assessment level? Or joint/collaborative planning?)

## **3. Does the programme develop teachers’ ‘subject knowledge’ and ‘phase knowledge’ – the ‘specialist role’ – to the depth and in a manner consistent with the Norms and Standards?**

- ❑ Explain how the programme treats the ‘specialist role’ in teacher education programmes.
- ❑ Explain how the ‘specialist role’ is taught in the programme. (How many notional and contact hours? And as a percentage of total time? Distinguish between subject/content/phase knowledge and method, and explain the balance between these.)
- ❑ How does subject/content/phase knowledge teaching relate to rest of programme? (Is it an add-on? Or is it planned as an integral part of total programme? What is taught? Who teaches? For instance, is it taught by a university academic within the discipline or by a school teacher? How are learners assessed? For instance, how is teaching observation integrated with content knowledge taught? Is content knowledge also assessed as a discrete competence? At what level?)
- ❑ What assumptions are made about entry knowledge of learners? How is this assessed/checked? What means exist to extend strong students and give developmental assistance to weak students?



**4. Is the programme conceptualised and delivered in a manner which integrates theory and practice, and strengthens provider-workplace linkages?**

- ❑ Explain how the programme works with schools in order to develop learner skills. (How long is teaching practice (TP)? When does it occur? Percentage of total programme time? What are its outcomes? How does teaching occur in TP? How does assessment occur?)
- ❑ How is TP linked to the rest of the programme? (How are students prepared for TP? Is the entire course geared to practice or is it treated as an 'add-on'?)
- ❑ How contextually sensitive is training as a whole? (What is lecturer experience? Recruitment? Research interests? What are the reading lists like – eg mix of local and international? Up-to-date or dated? Mix of theory and local practice?)
- ❑ Do students choose TP placements or do staff organise placements? On what basis? Are students encouraged to involve themselves in tutoring schemes etc outside of formal provision? Are these recognised as credits towards competence? How?
- ❑ Explain nature of links with work sites. (Only schools or a wider range of work sites, ie adult education, industry, etc? How do sites become involved, through invitation or randomly? How are schools/sites prepared for TP? What role/s do they play? Are they paid? Any contracts? Etcetera.)

**5. Does the programme – and the programme ethos – develop teachers as extended professionals and lifelong learners?**

- ❑ What degree of say do learners have in programme design and implementation? (Check both formal decision-making structures as well as nature of assessment. For instance, are many assignments 'open' to student choice and contextualisation, etc?)
- ❑ How much student-initiated activity (like involving themselves in tutoring schemes) is recognised towards qualification (if any)?
- ❑ Does the provider offer possibilities for ongoing professional development? How flexible is delivery? Are course run in times which allow practising teachers to attend?
- ❑ Are course materials used to create spatial flexibility in courses? Are assignments designed to encourage problem-solving within authentic contexts?
- ❑ Does the programme prioritise *and teach* critical engagement, reasoning and reflective thinking? (Is the focus overwhelmingly skilling or is there an emphasis on theorising? Is theory taught through problem-posing/solving and case study strategies?)
- ❑ Does the programme ground teaching in a wider social, economic and political understanding and awareness? Or is the programme narrowly focused on teaching, learning and curriculum? Is this theory taught through problem-posing/solving and case study strategies?)
- ❑ Does the provider demonstrate an understanding of teacher education as an activity which goes wider than formal schooling? Do they train or collaborate in the education of adult

educators, industrial trainers, etc? Do they have linkages with other educational institutions as well as work-sites outside of formal schooling?

- ❑ What involvement do staff have in policy-making and/or other social development activity outside of their mainstream activity?
- ❑ Is there an ethos which actively encourages lifelong learning and ongoing professional development? How does the institution handle recognition of prior learning (RPL)? Does the institution actively recruit in-service learners? (Note whether these are for discrete courses or whether the provider has attempted to run courses that are flexible enough to accommodate both in-service and pre-service students on the same course - see Section 8 of the NSE report.)

**6. Does the provider demonstrate characteristics that are likely to make it a self-improving, a learning organisation?**

- ❑ Does the provider have a formal system of course and staff review? Who is involved? (Are any outsiders involved? Are learners involved? Are 'users' - schools - involved?) How often is it implemented? What do its 'instruments'/processes assess/evaluate?
- ❑ Does the provider keep records of learners? Are they followed up? How? To what end?

**7. Inductive versus deductive approaches to programme design**

- ❑ Has the programme been designed on the basis of research? Was this research conducted among target learners? Or was the programme designed as a deductive 'desktop' exercise? Alternatively, is there evidence of a combination of deductive and inductive approaches?

**INSTRUMENT 6.5: PHASE 8 (CRITICAL ANALYSIS OF  
*NORMS AND STANDARDS FOR EDUCATORS*) –  
FRAMEWORK FOR ANALYSIS**

## **Phase 8: Framework for Critical Analysis of the *Norms and Standards for Educators* Report**

The *Norms and Standards for Educators* report contains seven key conceptual shifts in policy on educator development. These are the same that were used as the framework for Section One (questions 1 to 7) of Phase 6 (the third Group Interview). This same framework should be used as a basis for the critical analysis (Part Five of the Case Study Report) of the *Norms and Standards for Educators* report. The focus at this stage is set out in the five questions set out below.

The seven conceptual shifts will form the basic framework for Part Five of the Case Study. However, each of the five questions should be applied to each of the seven conceptual shifts.

The first three questions clearly refer to Phase 6 (Group Interview 3). Questions 4 and 5 will be answered on the basis of the programme description (Phases 4 to 5) and the ‘convergence analysis’ (Phase 7).

- 6** How is the shift understood by the programme team?
- 7** Is the shift perceived by the programme team to be a useful concept?
- 8** Is the shift perceived by the programme team to be desirable?
- 9** Is the shift feasible in the programme context?
- 10** Has the provider operationalised, or tried to operationalise, the shift in the programme, and if so how?

The key shifts are:

**8. The *Norms and Standards for Educators* report suggests that the assessment practices of an EDS programme must be applied and integrated.**

- A programme should assess whether learners are able to integrate (*horizontally*) the knowledge and skills delivered through the different courses/modules (and roles) which make up the teacher development programme.
- A programme should assess whether learners are able to integrate (*vertically*) the ability to perform important teaching actions competently (a practical competence), understand the theoretical basis for these actions (foundational competence), and reflect on and make changes to teaching practices (reflective competence) so that they can be described as achieving an applied and integrated competence.
- The assessment strategy should assess the extent to which learners have the ability *to teach in authentic and changing South African contexts*.
- Assessment should be *ongoing and developmental*.

**9. The *Norms and Standards for Educators* report suggests that EDS programme practices must develop in teachers an applied and integrated teaching competence.**

- The teaching and learning strategy of a programme should develop both horizontal and vertical integration, as well as authentic application.

- ❑ A programme should make links between the different courses/modules, and between different roles, which make up the teacher development programme.

**10. The *Norms and Standards for Educators* report suggests that EDS programmes should develop teachers' 'subject knowledge' and 'phase knowledge' – the 'specialist role'.**

- ❑ Subject knowledge teaching should be an integral part of the rest of the programme, and should not be an 'add-on'. The contextual roles should be integrated into the 'subject knowledge' or 'specialist' role. Also, teaching observation should be integrated with content knowledge taught.

**11. The *Norms and Standards for Educators* report suggests that programmes should be conceptualised and delivered in a manner which integrates theory and practice, and strengthens provider-workplace linkages.**

- ❑ A programme should work closely with schools in order to develop learner skills.
- ❑ Teaching practice should be linked to the rest of the programme, and students should be well prepared for it. Teaching practice, again, should be integral to the programme and not an 'add-on'.
- ❑ Training should be contextually sensitive.

**12. The *Norms and Standards for Educators* report suggests that EDS programmes – and the programme ethos – should develop teachers as extended professionals and lifelong learners.**

- ❑ Learners, for example, might be involved in programme design and implementation, either formally (for example through decision-making structures) or informally (for example, by making decisions regarding the nature of their assignments).
- ❑ Student-initiated activity (like involving themselves in tutoring schemes) might be recognised towards the qualification.
- ❑ A programme should offer possibilities for ongoing professional development. To this end, delivery should be flexible enough to allow practising teachers to attend.
- ❑ Assignments should be designed to encourage problem-solving within authentic contexts.
- ❑ A programme should prioritise *and teach* critical engagement, reasoning and reflective thinking.
- ❑ A programme should ground teaching in a wider social, economic and political understanding and awareness.
- ❑ Programme staff might be involved in policy-making and/or other social development activity outside of their mainstream activity.
- ❑ A programme should develop an ethos which actively encourages lifelong learning and ongoing professional development. How does the institution handle recognition of prior

learning (RPL)? Does the institution actively recruit in-service learners? (Note whether these are for discrete courses or whether the provider has attempted to run courses that are flexible enough to accommodate both in-service and pre-service students on the same course - see Section 8 of the NSE report.)

**13. The *Norms and Standards for Educators* report suggests that EDS programme providers should demonstrate characteristics that are likely to make them a self-improving, a learning organisation.**

- ❑ An EDS provider should have a system of course and staff review.
- ❑ An EDS provider should keep – and use purposefully - records of learners.

**14. The *Norms and Standards for Educators* report suggests that an EDS provider should adopt inductive rather than deductive approaches to programme design.**

- ❑ An EDS programme should be designed on the basis of research, and some or all of this research should be conducted among target learners. Conversely, a programme should not be designed through a deductive ‘desktop’ exercise.