

**Educators' Perspectives of the Implementation of the Integrated Quality
Management System (IQMS) in Secondary Schools within the Umlazi
District of KwaZulu-Natal**

By

Cutbert Thembinkosi Ndodakayidlile Buthelezi
B.ED. (Stellenbosch); HDE (Pretoria); B.A. (UNISA)

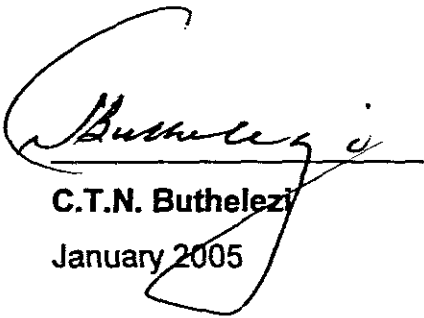
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Supervisor : Dr. M.K.K. Chetty

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Declaration

I, Cutbert Thembinkosi Nnodakayidlile Buthelezi, hereby declare that "*Educators' Perspectives of the Implementation of the Integrated Quality Management System (IQMS) in Secondary Schools within the Umlazi District of KwaZulu-Natal*" represents my own work both in conception and execution and that all sources used or quoted have been acknowledged by means of complete references.



C.T.N. Buthelezi
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Dedication

I would like to dedicate this work to the following people:

- My loving wife **Pinky Gugu Buthelezi** and children **Londiwe, Phiwekahle (Phiwe) and Sakhile**. Thank you very much for your unwavering support and for accommodating and understanding a husband and father who spent little quality time with you for the duration of this study.
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Abstract

Current demands in education necessitate a shift away from traditional inspection and supervision models for school improvement, toward a transparent and democratic approach for Whole School Development (WSD). This has resulted in the need for schools to implement an Integrated Quality Management System (IQMS). The IQMS, in an educational context, is a collective concept that integrates three fundamental components of WSD, namely the Developmental Appraisal System (DAS), the Performance Measurement (PM) and Whole School Evaluation (WSE). This study investigates the implementation of the IQMS in secondary schools within the Umlazi district. Insight into the IQMS is provided via a review of relevant literature. Furthermore, questionnaires have been used to access data from educators about the implementation of the IQMS.

Although most secondary schools have introduced the IQMS, many educators are still confused, not only about the process of implementing the IQMS, but also about the concepts used by the IQMS. Key findings of this study indicate the following:

- In some schools, educators do not understand the IQMS instrument.
- Advocacy and training programmes, in respect of the IQMS, are ineffective in some schools.
- Some IQMS structures are not yet in place.

Although the majority of educators indicated that they were aware of the IQMS instrument, 32% of the educators who participated in the survey indicated they had never heard about the IQMS instrument *for educator evaluation*. It is evident that such educators need greater exposure to the IQMS through advocacy and training programmes. It is also clear from this study that most schools are aware of the IQMS instrument but that implementation thereof remains problematic. This study is significant in that it exposes, in its findings, some of the problems

experienced by schools in the implementation of the IQMS. Recommendations to address some of these limitations are made in the last chapter of this publication.

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Acronyms used in this study

DAS	Developmental Appraisal System
DSG	Developmental Support Group
HOD	Head of Department
IQMS	Integrated Quality Management System
NDoE	National Department of Education
NGO	Non-Governmental Organization
PGP	Personal Growth Plan
PM	Performance Measurement
QPE	Quality Public Education
SADTU	South African Democratic Educators' Union
SDT	Staff Development Teams
SIP	School Improvement Plan
SMT	Senior Management Team
WSD	Whole School Development
WSE	Whole School Evaluation

Appendices

Appendix A	Letter requesting permission to conduct research
Appendix B	Questionnaire
Appendix C	Letter of approval

CHAPTER 1: ORIENTATION

1.1 INTRODUCTION

The National Department of Education (NDoE) has produced a number of school improvement initiatives, but implementation at school level appears to be faltering. One such NDoE initiative is the Integrated Quality Management System (IQMS). The IQMS, as applied to education, is a school improvement instrument that integrates three related but previously disparate systems; namely the Developmental Appraisal System (DAS), Whole School Evaluation (WSE) and the Performance Measurement (PM). Implementation of the IQMS has been mandated and scheduled for rollout in all schools across KwaZulu-Natal. The researcher's intention was to investigate the degree and effectiveness of the IQMS implementation.

When compared with other school and educator development initiatives, the IQMS better embraces the democratic principles of the South African constitution. The proposed system is more transparent and more developmentally focused than previously adopted systems. Educators, for instance, elect their own representatives on the Staff Development Team (SDT) and Developmental Support Group (DSG) and an educator's salary progression is tied to measurable and transparent performance criteria.

Despite the noble aspirations and intentions of the IQMS, the researcher's personal observations suggest that schools are not ready to implement the IQMS. It is suspected that this is, in part, due to the lack of change management skills in the profession and a narrow or inadequate understanding of the concepts and principles that underpin the IQMS. This study investigates the implementation of the IQMS in selected Umlazi secondary schools, as a means to sample and understand the nature and magnitude of implementation problems.

1.2 BACKGROUND OF STUDY

Educators, including principals, are expected to keep abreast of the issues related to their field of teaching. For educators to meet multiple challenges, including changes mandated by NDoE policies, they need to participate in workshops developed by school and departmental Senior Management Teams (SMTs).

Cloete (1985) as cited by Ngcongco (1996: 183-185) states, "one area in which teacher development may be upheld is through in-service education and staff development programmes". Although previously implemented educational policy underwrote the DAS, the PE and WSE, the implementation of these programmes as separate and distinct endeavours resulted in duplicity, unnecessary bureaucracy and overburdened workloads. The IQMS was conceptualized to integrate and incorporate these programmes.

Historically, school development focused almost exclusively on what the educator does in the classroom. In order to monitor the educator's management of classroom activities, the inspection and supervision models for school improvement were introduced. Ngcongco (1996: 183-185), commenting on educators' attitudes towards inspection and supervision, states that she had noted some uneasiness in this regard. She furthermore notes (*ibid*) that there seem to be a lack of clarity, even among practitioners, on the role of supervisors or inspectors. Under these models, educators were discouraged from being open and from learning from these processes. Instead educators felt threatened and defensive. It appeared to them that they were being judged.

According to Wiles and Bodi (1980) as cited by Shezi (1999: 39) "the first stage of supervision in America was basically inspection. It aimed at finding the wrong things which teachers were suspected of doing in the classrooms". Inspection aimed at monitoring rules, whilst supervision was practiced on the assumption that educators were under-qualified and, thus, needed monitoring to make sure

that they at least complied with the minimal acceptable levels of performance (ibid).

Alfonso and Neville (1981) as cited by Mkhize (2000: 64) contend that “the inspection and supervision model helps employees, such as teachers, to become skilful and effective in their work”. Inspection is a small component of supervision. It entails purely rating and evaluating educators using a set of standardized criteria (ibid). Glatthorn (1984) as cited by Ngcongco (1996: 185) states that supervision focuses on the problems which educators experience. This model is premised on the belief that educators will identify their problems and concerns, will share these with supervisors and then invite supervisors’ assistance (ibid).

The NDoE has however, adopted the human resource model for supervision as an initiative towards democratising the education system in South Africa. This is being done by phasing out school inspection, which is regarded as judgmental and policing, rather than being supportive and developmental. The initiative to move away from the inspection model is evident in the NDoE Developmental Appraisal Manual (1990: 51) where it states that “the impetus for the historical development of the Developmental Appraisal System (DAS) has been linked to the breakdown of inspectorate and subject advisory services in the majority of schools in South Africa”.

In 2003, the NDoE, introduced the IQMS. As stated earlier, the IQMS integrates and incorporates three fundamental systems, namely the DAS, the PE and WSE. The rationale for the implementation of the IQMS is to establish self-reliant schools through organizational and educator professional development. The IQMS is a national strategy developed to promote Quality Public Education (QPE), and institutions are thus, challenged to actualise the IQMS, through its successful implementation at school level.

1.3 STATEMENT OF THE PROBLEM

The IQMS is a novel, national endeavour to reconstruct the education system through institutional development programmes in order to ensure effective and efficient Quality Public Education (NDoE, 2003). As a result of its novelty, concepts within the IQMS, such as performance measurement, personal growth plan and development support groups are problematic because educators have not yet, fully, come to terms with them.

The integration of three programmes namely: the DAS, the PM and WSE has left educators confused. A common question is: "Why is the IQMS integrating these three programmes?"

It would seem that lack of understanding leads to poor advocacy and training programmes. Personal experience and circumspect observation of schools indicates that not only educators, but also their senior management teams (SMTs), are grappling to understand both the concepts underpinning IQMS and the processes involved in its implementation.

Principals, as first facilitators, do not appear to be espousing the same key messages regarding the IQMS and some lack the confidence to put in place the necessary support structures for successful implementation of the IQMS. Educators are therefore prone to developing a negative attitude towards IQMS concepts and may even impede its implementation.

Insufficient or inadequate advocacy of the IQMS and poor SMT-conducted training programmes, have resulted in an ethos of confusion and tension. In some instances, training of staff members has not yet materialized. The state of confusion and tension that currently prevails in a number of schools negates the ownership of the IQMS and jeopardizes its successful implementation.

Since the key objective of the IQMS is to promote sustainable WSD programmes, ineffective implementation of the IQMS instrument is, by extension, undermining WSD programmes' capacity to enhance the quality of public education.

Some educators can be seen to be distancing themselves from IQMS-related activities. No-one appears to be prepared to take a leading role in IQMS workshops. The latter is critical in building SMT capacity. If the situation is not remedied urgently, it is likely that schools will lose competent professionals who are frustrated by the lack of progress. Learners will ultimately feel the loss most acutely.

1.4 AIMS OF THE STUDY

This study aims to:

- Unpack the concepts underpinning the IQMS and provide clarity about its key objectives and components.
- Review national and international literature on strategies for the effective implementation of the IQMS.
- Investigate whether or not the IQMS is being effectively implemented in secondary schools within the Umlazi district of KwaZulu-Natal.

1.5 RESEARCH QUESTIONS UNDERLYING THE STUDY

The research questions underlying the study are:

- What is the IQMS?
- In the opinion of educators, is the IQMS being effectively implemented in schools?

- What are the factors, according to educators, that hinder the effective implementation of IQMS?

1.6 SIGNIFICANCE OF THE STUDY

The study will highlight how the IQMS is intended to achieve total quality education in schools. Furthermore, it will demystify IQMS concepts and provide insight into the perceptions that educators hold in regard to the IQMS and its implementation. The roles to be played by various IQMS structures will be highlighted. Moreover, this study will scrutinize the willingness of SMTs to facilitate the implementation of the IQMS. It will also reveal the rationale for integrating the DAS, the PM and WSE.

1.7 DEFINITIONS OF OPERATIONAL TERMS

1.7.1 GENDER ISSUE

When reference is made to one gender, it also refers to the other.

1.7.2 INVESTIGATION

According to Funk and Wagnall's Standard Desk Dictionary (1983: 342), *investigation* means "to search or inquire into, make a formal or official examination of something." For the purpose of this study, *investigation* shall mean to examine or inquire whether or not IQMS is being effectively implemented in schools.

1.7.3 IMPLEMENTATION

The concise Oxford Dictionary of Current English (1984: 501) defines *implementation* as "to put something into action for the accomplishment of any

purpose". For the purpose of this study *implementation* shall mean to put into action, plans for the new policy i.e. putting the IQMS into operation.

1.7.4 TEACHER / EDUCATOR

This concept refers to the educational practitioners who engage in classroom teaching and management. *Teacher* will be used synonymously with the concept *educator* throughout this study, unless otherwise indicated.

1.7.5 INTEGRATED QUALITY MANAGEMENT SYSTEM (IQMS)

According to NDoE (2003: 23) *IQMS* is an integrated quality management system that consists of three programmes, which are aimed at enhancing and monitoring performance of the education system. These systems are the Development Appraisal System (DAS), the Performance Measurement (PM) and Whole School Evaluation (WSE).

1.7.5.1 DEVELOPMENTAL APPRAISAL

The NDoE Developmental Appraisal Manual for Educators (1999: 09) states that appraisal implies making judgments and decisions on the quality or effectiveness of a programme, project, thing or set of actions. Sergiovanni and Starratt (1988) as cited by Jeffer (2002: 13) assert that the two basic types of appraisal can be differentiated as follows:

- **Formative/Developmental Appraisal**, which is concerned with "professional development and the improvement of practice by identifying strengths, weaknesses, needs and interests"; and
- **Summative Appraisal** which is concerned with "the selection, promotion, redeployment and dismissal of educators".

Sergiovanni and Starratt (1988) also illustrate the difference by referring to summative evaluation as judging the quality of teaching and formative evaluation

as emphasizing the effectiveness of the school with regard to the programmes and activities that are provided.

It is evident from these observations that developmental appraisal is a form of evaluation that seeks to engage the appraisee on a developmental level identifying his/her shortcomings in the class as well as in extra-curricula involvement. The appraisee together with the Development Support Group (DSG), jointly work out a Development Plan (DP) to capacitate the appraisee based on the findings by the DSG in classroom observation of the appraisee.

In this context *developmental appraisal* will mean educator development towards producing quality public education.

1.7.5.2 PERFORMANCE MEASUREMENT

According to the NDoE (2003: 21) the Performance Measurement (PM) will, be used for determining pay and / or grade progression (notch increase). It is used to evaluate the performance of educators within the period of a school calendar year.

1.7.5.2 WHOLE SCHOOL EVALUATION

Whole School Evaluation (WSE) refers to the evaluation of the overall effectiveness of the school towards self-reliance. Although a brief definition of the IQMS is given above, this concept will be clarified in greater detail in the next chapter.

1.8 ASSUMPTION

Advocacy and training programmes are imperative for the effective implementation of the IQMS.

1.9 LIMITATIONS OF EMPIRICAL STUDY

Although IQMS is to be implemented in all schools, the study will be conducted only in secondary schools within the Umlazi District of KwaZulu-Natal. The survey does not include principals as it is the view of the researcher that they are minimally involved in the implementation of the IQMS. The educators involved in the day-to-day teaching and management of classroom and learning processes, are ultimately the target of the IQMS and are responsible for making it a living entity. Thus the survey sample was limited to the educators who must own IQMS as their own evaluation tool.

1.10 PARAMETERS OF STUDY

The IQMS is a relatively novel national education initiative. It is therefore, expected that schools will experience some teething problems in implementing the IQMS. This study is somewhat ambitious in the sense that an investigation into the implementation of the IQMS fairly current. However, since the IQMS, according to the national directives, should have been implemented in 2003, the researcher decided to go ahead with the investigation in the hope that the findings and recommendations would be topical and practical enough to lend impetus and support to the IQMS implementation process.

1.11 CONCLUSION

In this chapter, the researcher has provided an overview of the scope of the study, its aims and its significance. Key concepts and terms were introduced and the parameters of the study were set.

The next chapter will provide a literature review of the implementation of the IQMS.

CHAPTER 2: LITERATURE REVIEW

2.1 INTRODUCTION

This chapter provides an in-depth review of literature on the IQMS. Prior to doing this though, a discussion of the traditional models of school inspection and supervision is provided to act as a comparative framework for the discussion of the IQMS. The failure of the school inspection and supervision model to meet the current demands for Whole School Development (WSD) will also be briefly discussed.

This chapter is structured as follows:

- An overview of traditional models for school improvement.
- Limitations of traditional models for school improvement.
- A discussion of principles that inform the IQMS.
- The rationale for introducing and implementing the IQMS.
- The IQMS instrument.
- Support structures for implementing the IQMS.
- Strategies to implement and manage the IQMS.
- Conclusion.

2.2 AN OVERVIEW OF TRADITIONAL MODELS FOR SCHOOL IMPROVEMENT

As discussed earlier departmental (top-down) school inspection and supervision were the cornerstones of the traditional models for school improvement. The impetus for these models was summative and evaluative rather than incremental and developmental. A discussion of inspection and supervision is provided below.

2.2.1 INSPECTION

Traditionally, inspection served as a prerequisite to supervision. Inspection is thus intrinsically linked with supervision because it always leads to supervision. According to Ngcongco (1996:183-185) *inspection* is a small component of supervision, focused on rating and evaluating educators using a set of standardized criteria. It can be used for maintaining standards across schools in the variety of regional contexts, whereas *supervision* focuses on the problems which educators experience. According to Clegg and Billington (1994: 04) inspection explores all aspects of school life, and will have some effect on virtually all those involved in school activities. If schools are to be well prepared for inspection, then they need to be very clear about the roles played by key people. In short inspection is about evaluating educator performance, management and administration of the school. Butler (1999) as cited by Hlatshwayo (2002: 15) asserts that in the past, many appraisal inspections conducted in the South African education system were bureaucratic and judgmental. Many educators felt that inspections did not help them to improve their teaching practice but were used as a way to control them. In support of Butler's argument, Munro (1995: 56) asserts that "inspectorates, supervisory and advisory services have been characterized by highly centralized, patriarchal control and which have been linked to racially-based departments which have blocked change and entrenched conservatism".

2.2.2 SUPERVISION

According to Gibson (1990: 04) supervision is directed by first line management. Sergiovanni and Starratt (1988: 69), assert that the focuses of supervision are people and programmes. Departmental supervisors work with school-based first line managers through an individual programme to effect positive change in educators. Sergiovanni and Starratt (ibid) point out, however, that supervisors differ greatly in the amount of trust they have in other people and that this carries over to the particular group of employees they supervise. Supervision, as a traditional form of educator development, was hampered by the lack of mutual trust between supervisors and educators. Supervision was more of a prescriptive form of school improvement, which followed top-down inspections. Principals used to be left with a task of supervising educators after the faultfinding mission of the inspection by the then school inspectors. There were no proper guidelines given to the principals with regard to supervision and thus conflict ensued within the school.

Ngcongong (1996: 183-185) states that there does not seem to be clarity, even among practitioners, on the role of supervisors or inspectors regarding teaching. The confusion surrounding supervision and inspection seemed to discourage educators from being open to learning from those processes. She states that educators felt threatened and defensive when they thought they were being judged. The NDoE (2000: 10) contends that principals and HODs did not provide any instructional leadership. Instead, it was their job mainly to control educators and learners. Once an educator feels threatened at the workplace he will develop a negative self-image and thus develop low self-esteem. Back, Back and Bates (1990: 21) assert that your *self-esteem* is the evaluation that you make and hold about yourself. If your self-esteem is low, then you will feel uncomfortable and threatened. According to Steyn (1994: 45) people with a poor self-image are highly dependant on recognition and are more likely to be influenced by it,

positively or negatively. These limitations and inadequacies in the supervision and inspection models impacted negatively on an educator's morale and professional conduct. This manifested itself in high educator stress levels, high educator absenteeism and evidence of physical withdrawal from work.

Traditional models of supervision and inspection provided inadequate developmental input and its judgmental and policing nature undermined educator involvement in and ownership of school improvement processes.

2.3 LIMITATIONS OF TRADITIONAL MODELS FOR SCHOOL IMPROVEMENT

It is argued that inspection did not help educators to develop because it was more about faultfinding than assisting. Faultfinding would lead to job dissatisfaction and job withdrawal. According to Steyn (1994: 52) *job withdrawal* is "a set of behaviours that dissatisfied individuals enact to avoid the work situation". If educators are dissatisfied, they display negative behaviours. If an educator avoids the work situation, he will keep on absenting himself from work, thus compromising the learning environment.

Physiological withdrawal is one of the consequences of job dissatisfaction. Steyn (ibid) notes that that if the dissatisfaction has to do with the job itself, the staff member may display a very low level of job involvement. An educator who has to be inspected, with no professional development, might end up being frustrated and eventually stressed out. Under the inspection model, any deviation displayed by an educator would lead to strict policing by the principal rather than educator support and professional development.

Supervisors would often define model educator behaviour and evaluate the educator's mastery of these behaviours. The underlying assumption is that educators learn to teach by being told the best way to teach, by practising and by

being given feedback on how close the educator's performance comes to the supervisor's expectation. This is a normative approach to educator development that discounts individual educators' backgrounds and individualism. According to Bowling-Carr and Burnham (1994: 233) inspection is about gauging whether a particular component comes to the required standard before it goes on to the next production stage and inspecting the finished article to decide if, in total, it meets the specification. Bell (2003: 01) concurs with Bowling-Carr and Burnham as he states that the purpose of inspection is to provide an independent evaluation of the quality and standards of the schools, how well it is led and managed and the development of its pupils.

According to the NDoE (1998: 33) school inspection was more product-orientated than process-orientated, policing, rather than supportive, negative rather than positive. This inspection system also judged the educator rather than finding ways to improve an educator's performance. In a nutshell, the traditional inspection model for school improvement caused more damage than good in our education system. It impacted negatively on educators.

Job satisfaction and the emotional well-being of educators are critical if they are to be productive. It has also been acknowledged that ongoing and fast-paced changes in the education system necessitate ongoing educator support and development. Traditional supervision and inspections had deteriorated to a point where it could not longer provide the supportive and developmental ethos required. Educators were de-motivated and would not co-operate with their school management teams. Some of the educators became victims of stress. According to Schafer (1996: 10) stress is almost always a sign of some kind of disharmony amongst different wants or needs within the person or between the person's inner wants and needs and outside circumstances.

Monat and Lazarus (1991: 414) concur with Schafer, observing that when most people speak of being under stress, they are usually referring to the external

demands impinging on them such as pressure at work or illness of a family member. Thus stress in most cases is caused by external factors rather than internal ones.

According to the NDoE Management Guide (1999: 174) stress is usually activated by changes or developments over which an individual educator has very little or no control at all. The marginalization of the educator in policy formulation and implementation needs to be rectified. Convey (1996: 142) observes that when stress and pressure mount, people start yelling, over-reacting cynically, and being critical or silent. This is not conducive to school improvement. Lack of trust and suspicion that prevailed under traditional inspection and supervision models must be eradicated if schools are to function optimally.

The IQMS is the NDoE's response to these challenges and an attempt to transfer ownership of the delivery and evaluation of quality public education back to the educators at grassroots level. NDoE has recognized the need to provision for skilled change managers and infrastructure at the school level to support transition to and continued sustainability of the IQMS.

2.4 PRINCIPLES THAT INFORM THE IQMS

The NDoE has developed a new three-dimensional programme, namely the IQMS, to enhance the quality of teaching and learning in all nine provinces across the country. The IQMS integrates and embodies three fundamental quality management systems, namely the Developmental Appraisal System (DAS), the Performance Measurement (PM), and Whole School Evaluation (WSE).

It is acknowledged, that it will be difficult to develop the IQMS as a continuous, sustainable program, without advocating sound principles for the implementation

thereof. Although there are a number of principles that underpin the IQMS, two key principles will be given emphasis, namely transparency and trust.

2.4.1 TRANSPARENCY

Transparency was not a norm for the traditional inspection-supervision model. Educators were evaluated, but results of such evaluations were not discussed openly with the educators. There was a definite lack of transparency in this system. Chetty (1998: 69) asserts that transparency fosters mutual trust amongst all stakeholders and creates a system where every member is treated with respect and dignity. Hence a core principle of the IQMS is transparency. This principle advocates a situation where educators will be appraised on clearly defined, transparent and measurable performance criteria. Chetty (1998: 69) concurs with Parker and Novak (1984), asserting that transparency is about self-disclosure and is determined by how comfortable we feel in revealing ourselves to others. Hence, the IQMS promotes a culture of shared experiences whereby educators work collaboratively to identify personal and collective organizational limitations for the purpose of whole school development.

According to the IQMS policy document (NDoE, 2003: 09), the Developmental Support Group (DSG) must discuss their evaluation with the educator and must provide feedback on classroom observation. The National Developmental Appraisal Manual (NDoE, 1999: 16) suggests that the process of appraisal should be open and transparent. This makes it possible for decisions to be justified, balanced and fair.

Under traditional inspection and supervision models, educators were held accountable for shortfalls in terms of their performance without provision for a development programme to address these shortcomings. The NDoE (1988: 34) confirms this, noting that inspection and supervision were judgemental, negatively blamed educators and excluding appraisees in evaluation reports. The

inspection and supervision model is contrary to the principles of the IQMS. It is therefore important that for the IQMS to be successful, all the stakeholders should work jointly and transparently to promote an ethos of trust among professionals.

2.4.2 TRUST

Another critical principle of the IQMS is trust. Jones (1980) as cited by Chetty (1998: 69) is emphatic that an atmosphere of trust is imperative for professionals to work harmoniously together. DSGs are responsible for providing peer-mentoring and support programmes. Mentoring and support of educators is critically dependent on mutual trust between the mentor and the educator. A mentor is a trustworthy colleague within a DSG who has, and is deemed to have, the necessary expertise and knowledge to provide meaningful support to the educator placed under his professional care.

A quotation worth noting by Purkey and Novak (1984: 58) reveals that “you can know me truly only if I let you, only if I want you to know me. If you want me to reveal myself, just demonstrate your good will – your will to employ your powers for my good and not for my destruction.” The mentor has to demonstrate good will, which refers to willingness and sincerity in developing the peer. The peer in return will consequently be more open to professional development and intervention programmes.

The development of mutual trust between the appraiser and the appraisee is a deviation from the traditional approach which did not take time to build relationships and promote ownership of developmental processes. The IQMS document (NDoE, 2003: 10) stresses that different schools, depending on the purpose for which information is being collected, may need different degrees of control and different control mechanism to secure trust. SDTs will need to address the principle of trust in their planning in order to ensure that personnel

feel adequately protected from judgments. The appraisal panel should protect the image of the appraisee against exposure of educator weaknesses to both learners and colleagues. A professionally safe environment for educators to work in will also serve to boost the morale of educators.

2.5 RATIONALE FOR THE INTRODUCTION AND IMPLEMENTATION OF THE IQMS

Adoption of the IQMS is predicated by an understanding of why changes were implemented and an understanding of the philosophy that informs the proposed changes. This section provides a brief discussion of the change drivers and philosophy that inform the IQMS.

2.5.1 IMPROVEMENT OF MORALE

Educator morale suffered significantly under traditional inspection and supervisor models due to the perception that educators were being “judged” by external parties who had little insight into the socio-historical context of the particular school or the developmental progress and needs of the individual educator. Educational professionals often became de-motivated as a result of being marginalized in the performance evaluations and a perceived lack of career mobility. There was also a general sense of under-appreciation that often manifested itself in individuals working for large multinational companies or large civil service departments.

A key aim of the IQMS is to enhance the morale among educators in schools. According to Evans (1998: 03) *morale* is a state of mind encompassing all the expectations determined by the individuals’ anticipation of external influences of satisfaction to those needs that he perceives as significantly affecting his total work situation. Educators need to be satisfied in the workplace situation in order to be productive.

Kenzevech (1975), as cited by Chetty (2003: 66), asserts that "morale is a means of promoting a smoothly functioning and productive institution. He cautions that it is possible to have high morale and little accomplishment (ibid). It remains the managers' responsibility to try to promote this general feeling of well-being during the implementation of the IQMS so that all people in the institution will work together with common purpose. Chetty, (2003:66) cautions that the principle of morale challenges school leaders to work at reducing the anguish, stress and strain of everyday life in the work place. Such negatives serve as barriers to the successful implementation of IQMS. Dekker and Lemmer (1994) as cited by Chetty (2003:60) suggest humour, as one of the ways in which to boost morale and reduce angst in the work place. They state that humour empowers one to distance oneself from one's own certainties, to question one's own position and to reconsider a particular stance (ibid). Hence, when such an attitude prevails, it creates non-judgmental thinking necessary for boosting the morale among educators.

2.5.2 PERSONAL AND PROFESSIONAL DEVELOPMENT

According to Hoyle and McMahon (1986: 46), there are at least two dimensions for educator development, namely personal and professional. Personal and professional development underpins the IQMS. Educators are offered professional development in the form of skills and competency-enhancement workshops. Personal development takes the form of recognition and promotion of educator strengths and interest, the promotion of emotional well-being and a healthy self-concept and preparation of educators for salary and grade progression, as a form of reward. Participate management is promoted by encouraging the educator to develop a Personal Growth Plan (PGP) with the help of the DSG. The PGP is developed after class observation and is designed as a tool for personal and professional growth and development. It is one component of the IQMS, which supports a school to move progressively towards

critical self-reliance. Evans (1998: 83) defines a professional educator as one who sees teaching as a career, which incorporates continued personal and professional development, underpinned by constant appraisal and self-improvement.

A PGP takes cognisance of educators' areas of strength as a springboard for further development. It is noted that a PGP compliments or appraises the educator rather than "blames and shames" as was in the case in traditional inspection and supervision approaches. According to the resolution 8 of the Education Labour Relations Council (2003: 13), the DSG is responsible for assisting the educator to develop a PGP and work with the SDT to incorporate plans for development of the educator into the overall School Improvement Plan (SIP).

2.5.3 COMPETENT PROFESSIONALS

The development of competent professionals is a critical component of the IQMS. Competent professionalism is about self-efficacy. According to Bandura (1977) as cited by Rice (1987: 75) "self efficacy is the perfection of capability, the belief that we possess personal skills and performance abilities that will enable us to act correctly and successfully in given situations". Rice (ibid) further states that self-efficacy is a self-schema about personal competency and mastery. Competent professionals are those educators, who will make a difference in their respective schools by rendering quality education. . Hoyle and McMahon (1986: 127) assert that competent professionals are those educators who carry out their jobs successfully. The ultimate objective of the IQMS is to support and develop educators to the point of being competent leaders or professionals who will put the interest of the learner above all else. Such educators will have the capacity to produce learners who will be competent and marketable to the global job market.

According to Steyn (1994: 55) the following are characteristics of competent professionals.

- Knows his/her job or his field thoroughly
- Stays on top for current development trends and theories
- Knows his/her people including their strengths / weaknesses / hopes and goals
- Shares a vision of service, excellence and achievement with others
- Demonstrates by her/his words and actions
- Demonstrates strength of character

Competent professionals believe in deeds rather than words. They lead an upright life, realizing that strength of character is crucial at any level of leadership (ibid). Competent professionals are also assertive and self-assured.

2.5.4 SELF-RELIANT SCHOOLS

The fundamental purpose of the IQMS is to evolve self-reliant schools. Van Deventer and Kruger (2003: 234) assert that in keeping with the current international trend towards democratisation, there is a tendency to move away from totally dependent public schools to self-reliant schools, through school-based management.

School-based management is an approach to public schools governance and management where the school's educators, learners and parents are given the opportunity and empowered to improve and develop their schools (ibid). Potter and Powell (1992: 11) assert that self-reliant schools reflect the following characteristics:

- The school has a set of commonly held aims, which are understood by educators and learners.

- Educators and learners foster an atmosphere of mutual trust and respect through open communication.
- Learners receive clear feedback on their performance and are shown what is expected of them.

Sound leadership is imperative to facilitate self-reliant schools. Potter and Powell (1992: 12) places emphasis on the leadership of the head educator. They claim that effective leadership is reflective of the following characteristics:

- The head-educator places greater emphasis upon the quality of the classroom experience.
- The head-educator is aware of educators' needs, offers feedback on performance, makes use of praise, encourages educators' long-term professional development and uses that development for the good of the school. Individual educators' are able with the assistance of the DSG to determined strengths and weaknesses and develop a PGP to support personal and professional development. The head-educator, DSG, SGB and SMT are able to incorporate individual PGPs into the overall SIP.
- The principal provides positive leadership; she/he sets goals and motivates the staff to be committed to their achievement.
- The principal is willing to take risks, educators trust him/her to know what he/she is doing since there is an agreement that all should be for the good of the learners. Trust plays a major role in a self-reliant school.

According to the KwaZulu-Natal Department of Education and Culture (KZNDEC) (2002: 13) school-based management puts greater responsibility on school principals, SMTs and SGBs. They are responsible for:

- Building participation and collaboration.
- Developing capacity.
- Accepting responsibility for self-management (ibid).

It is evident from the above that schools have to take more responsibility for themselves. The school should rely on its own human resources to facilitate the effective implementation of the IQMS.

2.5.5 QUALITY ASSURANCE

Quality assurance is a system of ensuring quality in schools and the education department as a whole through monitoring and evaluating performance (NDoE, 2003: 07). The IQMS is thus, about rendering quality public education in our society. Quality assurance can only be achieved if educators are professionally developed and supported. The NDoE (1998: 05) states that quality assurance refers to all activities and functions concerned with determining whether or not educational service provision and outcomes meet specified quality requirements. According to Wright and Eatwell (1991: 58), "Quality Assurance refers to ensuring that the processes used in the production or service and quality control are themselves of a sufficiently high standard". In education it means that there should be mechanisms to ensure that learners are being offered the best possible opportunities in life.

Quality assurance according to Chetty (2003: 20-21) citing Aspen et .al. (1994):

- promotes the value of excellence and high standards of individual and institutional aspiration, achievement and conduct in all aspects of its activities.
- is democratic, equitable and just.
- humanises education stakeholders and gives them an introduction to, and opportunities for acquiring the values that will be crucial in their personal and social development.
- develops a sense of interdependence among the organizational variables.

- Prepares education stakeholders to conduct their interpersonal relationships in ways that are not inimical to the health and stability of the organization or the individuals that comprise it.
- prepares school members to have a concern for the cultural as well as the pedagogical enrichment of the organizations.
- conjoins education for personal autonomy and education for community enmeshment and social contribution, enabling each student to enrich the society of which he or she is to become part as a giver, an enlarger and an enhancer, as well as being inheritor and recipient.

Quality assurance is a critical feature of the IQMS. The effective implementation and management of the IQMS will lead to the assurance of quality education in schools across the country.

2.6 THE IQMS INSTRUMENT

For schools to become effective there is a national directive in place for three fundamental systems to be integrated and implemented in schools across South Africa. These systems are the Developmental Appraisal System (DAS), the Performance Measurement (PM) and Whole School Evaluation (WSE). Together these inform the IQMS. Each of the above-mentioned systems will be discussed below.

2.6.1 DEVELOPMENTAL APPRAISAL SYSTEM (DAS)

According to Gerber, Nel and Van Dyk (1996: 445) the DAS is a method by which the employee is appraised individually, without any direct comparison with other employees. Munro (1995: 30) argues that teaching is an individual task and that no two educators are the same. Staff appraisal is essentially concerned with the professional development of the individual and the nature and the personality of the individual. Goba (2002: 10) argues that the DAS is an integral part of

effective educator development, because it identifies most accurately the individual development needs of the educator. Munro (1995) as cited by Goba (2002: 10) asserts that “the fundamental purpose of the systematic Development Appraisal System (DAS) lies in individual development”. Educator developmental appraisal will always be needed since the South African education system keeps changing to accommodate democracy and diversity. Davidoff and Lazarus (1997: 139) claim that one of the weakest areas in education in South Africa has been the evaluation of educators, because evaluation has been managed in a top-down, hierarchical way. It was seen as a way of maintaining control and keeping surveillance over educators (ibid).

DAS replaces the traditional approach of inspection and supervision models as cited earlier on in this chapter. Middlewood (1997) as cited by Hlatshwayo (2002: 07) states that the “Developmental Appraisal System (DAS) is a process in which appraiser and appraisee operate as a professional partnership driven by the appraisee’s needs. This is shown by the negotiated focus for classroom observation”.

Middlewood (1997), as cited by Jeffer (2002: 18), stresses the need for the DAS to be embedded in the culture of the organization if it is to be effective in both its developmental and evaluative aspects. He postulates that the responsibility of the senior managers in school is to establish this culture whereby performance is monitored and feedback given. Feedback is given timeously to the appraisee for his personal assessment. According to Goba (2002: 13), DAS enhances professional leadership, promotes shared vision and goals and increases the concentration on teaching and learning. The purposes of DAS are related to improving individual performance and to ensure greater organizational effectiveness (ibid).

2.6.2 PERFORMANCE MEASUREMENT (PM)

According to Ivanicevich and Glueck, (1986) as cited by Gerber, Nel and Van Dyk (1996: 442) the Performance Measurement (PM), "is used to determine the extent to which an employee is performing the job effectively". The PM helps to provide feedback for professional development, assess individual and group training needs, determine who is to be promoted, make salary decisions and serve as a tool for new staff selection (ibid). According to Ariston and Botha (1999: 130) the PM is about assessing an individual's performance more formally to gather accurate and reliable information, which can be used to:

- provide formal performance feedback to employees;
- develop the skills of employees;
- identify employees eligible for promotion;
- make salary adjustments; and
- administer performance bonuses.

For educators to be professionally developed, managers, such as principals, should take educator appraisal seriously. Bollington-Carr and Burnham (1990:12) assert that appraisal can be regarded as a response to the desire to bring a greater degree of accountability to the public service. Management has a responsibility of ensuring quality delivery in their organizations. This can be done through human resource appraisal and development. King (1990: 20) argues that, if educators are properly developed through the appraisal system, there is a great possibility of job satisfaction and proper delivery. Smith (2004: 03) concurs when he states that educator quality is one of the most significant factors in learner achievement and educational improvement.

2.6.3 WHOLE SCHOOL EVALUATION (WSE)

According to Shipman (1983: 03) the purpose of evaluation is to increase the effectiveness of schooling. Confidence in an organisation such as a school

depends on knowing what is supposed to be achieved. Sergiovanni and Starrat (1988: 328) argue that the WSE is about upgrading the quality of education. Hoyle and McMahon (1986: 100) assert that "school self review" or evaluation refers to the process whereby the school reflects upon and assesses its own work as a strategy for school improvement. WSE also promotes self-renewal, since it encourages schools to look into areas of strengths and weakness and use the former as a springboard for an improvement plan so as to eradicate the latter.

Chetty (2003: 59) argues that Whole School Development (WSD) is built upon the philosophy of "voluntarism", which acknowledges man's ability to make conscious choices to voluntarily constructing his own world (school) in accordance with his own needs and value system and not those determined by mechanistic and alienating forces. In other words, schools must take ownership of their development. Hoy and Miskel (1996) state that quality school administrators lead their schools by transforming their culture into one that emphasises cooperation, trust, openness and continuous improvement.

WSE is about continuous improvement through SWOT analysis, where SWOT is an acronym. **SWOT** is defined as follows:

- **S** signifies the strengths of the school or any institution that may be utilized as a springboard for the school to develop.
- **W** denotes weakness of the school such as learner drug or alcohol abuse. Such, weaknesses need to be controlled through well-planned strategies such as forming partnerships with professional organisation like SANKA-Rehabilitation Centre and local social welfare organizations.
- **O** signifies opportunities that the school may have at its disposal. A school may, for example, be the only one in the area offering specialization in Information Technology (IT). This may unlock

opportunities to boost learner enrolment or engage the private sector in learnership, sponsorship and job placement programmes.

- T denotes threats for the school. This could be a mushrooming of squatter camps or informal settlements near the school. Such informal settlements could lead to high rate of school vandalism and school water and electricity abuse. Therefore, there should be strategies in place such as intervention programmes with the support of the community and police to deal with people who are posing a threat to the development of the school.

Smith (2004: 03) argues that WSE evaluates the overall effectiveness of a school, including the support provided by the district, ward, school, management, infrastructure and learning resources as well as quality of teaching and learning.

The DAS, the PM and WSE are interwoven and intertwined ensuring that the IQMS becomes a reality and is successfully implemented at the school level. The DAS and the PM are directly focusing on educator professional development, whilst WSE focuses on development of the entire school, including human, infrastructure and material resources.

2.7 STRUCTURES TO IMPLEMENT IQMS

In order for IQMS to be successfully implemented key structures need to be established. These include the Staff Development Team (SDT) and Developmental Support Groups (DSG).

2.7.1 STAFF DEVELOPMENT TEAM (SDT)

According to Thurlow and Ramnarain (1996) as cited by Hlatshwayo (2002: 17) "every school is required to establish an elected Staff Development Team. Among the responsibilities of the SDT is the initiation of the appraisal process; facilitating appraisal training and ongoing support and the preparation and

monitoring of a management plan for appraisal". SDTs are further responsible for constituting appraisal panels and the identification of appraisees; ensuring a link between appraisal and whole school development; monitoring the effectiveness of the appraisal system and ensuring that records are maintained (ibid). Hlatshwayo (2002: 18) asserts that the purpose of the SDT in the DAS is to initiate, co-ordinate and monitor the appraisal process in institutions and ensure that training in the DAS occurs. It is also incumbent upon the SDT to facilitate ongoing professional support.

Sergiovanni and Starrat (1983: 327) assert that the SDT assumes a need for people (educators) at work to grow and develop. Educator growth is less a function of polishing existing teaching skills or keeping up with the latest teaching developments and more a function of an educator evolving his view of himself, the school, the curriculum and learners. SDTs help to train and support every educator to develop professionally, so as to keep up with the latest challenges in the teaching fraternity. Gerber, Nel and Van Dyk (1996: 49) assert that the SDT is responsible for development of a specific employee's personal growth and personal goals to meet changed job expectations / requirements. SDTs identify each and every educator's needs and provide on-site training and professional support. Bailey (1987: 99) argues that SDTs must be prepared to re-examine the organizational assumptions about the best ways of working together, to test them against changing educational conditions and requirements and to re-cast their roles and responsibilities in response to the review.

2.7.2 DEVELOPMENTAL SUPPORT GROUP (DSG)

Gerber, Nel and Van Dyk (1996: 49) state that the DSG is responsible for identifying development possibilities within a job/position for a specific employee, with reference to the employee's, personal growth and personal goals. A DSG is a structure established to provide mentoring to each and every educator towards professional excellence. Both the SDT and DSG should take cognisance of the

fact that teams are not established automatically; it involves a process, which is evolutionary in nature.

2.8 STRATEGIES TO IMPLEMENT AND MANAGE THE IQMS

2.8.1 PERFORMANCE GROWTH PLAN (PGP)

According to Hlatshwayo (2002: 28) a PGP helps the appraisee, to identify areas of development and make proposals on how to meet developmental milestones within defined timeframes. Resources that are required to achieve this are identified and performance indicators to demonstrate attainment of the objectives are agreed upon.

2.8.2 SCHOOL IMPROVEMENT PLAN (SIP)

According to Hopkins (1998: 01) a SIP is an approach to educational change that enhances learner performance and strengthens the schools' capacity for managing change. Hoy and Miskel (1988: 274) maintain that the SIP is a central step in the process after recognizing the problem, collecting data, and specifying the problem and its boundary conditions. Decision-makers then develop systematic and reflective plans of action. The process involves at least the following steps:

- Specify alternatives. Schools would not rely on one plan to facilitate WSD, but would explore a few alternate options.
- Predict the consequences of each alternative. Again IQMS is about creating visionary leaders at the school. The consequence of each and every alternative opted for would need to be fully explored.
- Deliberate. The IQMS encourages open deliberation on educational issues. The IQMS sets out to produce schools that will be able to manage

their affairs (self-reliant schools). This calls for having proper and situational SIPs.

The NDoE (2003: 12) asserts that, the SIP enables the school to measure its own progress through a process of ongoing self-evaluation. This must happen continuously.

There are other strategies to be adopted concurrently with the PGP and SIP to manage and implement the IQMS effectively, these will be discussed below.

2.8.3 COMMUNICATION

Communication is the best tool to get things done properly in any organization. Open, transparent and constant communication between all role-players, easy access to information and consistent reinforcement of the key messages of the IQMS, is crucial to the successful adoption and implementation thereof. In order to mobilize the IQMS programme effectively within the school, different communicative channels become imperative.

2.8.3.1 COMMUNICATIVE CHANNELS

Communicative channels and strategies identified by Govindsammy (2002: 21) and Machwardt (1983: 128) can be adopted to facilitate the implementation of the IQMS in schools. They identify the following useful communicative channels/strategies:

- Use of intrapersonal communication;
- Use of interpersonal communication;
- Use of small group communication; and
- Use of public communication.

These are discussed in greater detail below.

a. Intrapersonal communication

This occurs as when an individual communicates with himself. Govindsamy (2002: 22) asserts that intrapersonal intelligence is “our cognitive ability to understand and sense ourselves”. There is one participant and the conversation takes place in the mind of the individual. This is exactly what should happen when an educator works through his IQMS baseline evaluation. He becomes self-reflective and conscious of the processes of teaching and learning through introspection and internal articulation of what he is doing on a day-to-day basis. He is able to reflect on and articulate for himself what he knows and what he does not know in relation to his day-to-day job activities. His area of strength will serve as a baseline to improving those areas still lacking in his professional development.

b. Interpersonal communication

According to Mackwardt (1983: 129) interpersonal communication refers to the transmission of ideas and information between two or more persons. Govindsamy (2002: 22) asserts that interpersonal communication takes place in a face-to face situation, between two or more participants. This interpersonal communication should take place in the IQMS context as a pre-evaluation and post-evaluation discussion where the DSG engages with an educator before and after he/she is assessed or observed in class. The core aim of their discussion is to hear from the educator whether or not he/she understands what is expected of him in terms of various performance standards and criteria on how he/she will be rated and to assist the appraisee in developing a PGP. Interpersonal communication provides an educator with an opportunity to clarify areas of concern that he/she may have. Interpersonal communication promotes the IQMS principles of transparency and trust.

c. Small group communication

Borchers (1992) as cited by Govindsamy (2002: 22) states, "a group must have a common purpose or goal and they must work together to achieve that goal. The goal brings the group together and holds it together through conflict and tension". Small group communication should take place during the IQMS process when the DSG workshops IQMS concepts. The opportunity should be used to reinforce key IQMS messages and promote a common IQMS dialect and purpose.

d. Public communication

According to Sisson (1995: 603) public communication is what enables an organization to work towards its goals. Public communication will facilitate a common set of IQMS messages to be communicated in advocacy and training programmes, communication with the parents, communication with the community in which the school is embedded and communication across different educational institutions and departments. Regional, national and even international participation in workshops is facilitated by a common IQMS dialect in the public domain.

According to Megginson (1981: 289) vertical channels of communication are used when managers and subordinates communicate. Vertical communication includes both a downward and upward flow of messages through the organizational structure, whereas horizontal communication channels are used by managers on the same level to coordinate their activities.

Bell (1995), cited by Chetty (2003: 64), states that open communication is an essential management principle since decisions can only be made, plans implemented, activities coordinated, controlled tasks delegated and staff motivated and developed through an effective system of communication. In any

communication situation parties involved should be clear about the purpose or objective of the communication. In the IQMS, the purpose of communication is fundamentally to ensure clarity of organizational goals and professional intentions.

2.8.4 TEAM BUILDING

A sound strategy to manage and implement the IQMS is the building of strong teams in the school. Vilbro (2003: 12) clarifies that a *team* is a “group of people who share a common name, mission, history, set of goals or objectives and expectations”. A strategy that can help groups develop into real teams is team building. Teamwork in a school context is about team members complementing each other for better delivery of quality public education. Members work jointly as a team to accomplish a set task. According to Bowring-Carr and Burnham (1999: 119) teams need to be nurtured and developed if they are to be effective vehicles for development. Looking at the structures of the IQMS such as the DSG and SDTs, it is clear that the successful implementation of the IQMS is dependent on strong team building and co-operation. Gerber, Nel, and Van Dyk (1996: 522) note that any organization is dependent on the effective co-operation of a number of managers, and that these managers are compelled to work together on a permanent or semi-permanent basis to perform their jobs effectively. A team building programme is therefore a planned event with a group of people who have a particular relationship and common organizational objectives.

Teamwork is about goal and vision sharing of an organization. No individual member is bigger than an organization. Teamwork is also about pulling in the same direction. Gwarinda (1995: 21) argues that an educator should be conscious that development is not an individual feat. It is achieved by people working collectively. The IQMS is about teams working together to promote academic competence and self-reliant schools. Francis and Young (1979), cited by Vilbro (2003: 16), claim that teams work best under the following conditions:

- Where there is a high level of interdependence among team members. Interdependence is a key feature of the IQMS as all the competencies and strengths of individuals are harnessed to address weaknesses as is evidenced in a SIP.
- A team leader has good people skills, is committed to developing a team approach and allocates time for team building. The IQMS advocates development of school-based management as a core principle. A developmental bias is clear indication of commitment to team building.
- Each team member is capable and willing to contribute information, skills and experience that provide an appropriate mix for achieving the teams' purposes.
- The team develops a climate in which people feel relaxed and are able to be direct and open in their communications.

According to Vilbro (2003: 22), it is expected that teams pass through the following four highly predictable stages:

- Forming,
- Storming,
- Norming, and
- Performing.

2.8.4.1 STAGE 1: FORMING

People who have been picked to be on teams will feel a sense of pride that they have been chosen, but they will have a lot of questions such as "What is expected of me?", "Will I fit in?", "What am I supposed to do?", "What are the rules?" Most members of a team are anxious about their role in a group and about what others expect of them.

The forming stage in relation to the IQMS is emphasized as a participative process where SDT members are elected by staff members and usually comprise the principal, a deputy principal and HODs working collaboratively as a team. Members new to change management may initially feel insecure and anxious.

2.8.4.2 STAGE 2: STORMING

Vilbro (2003: 22) characterizes this as a period of blaming, defensiveness, confrontation, disunity, tension, and hostility. Tuckman and Jansen (1994: 419) assert that this stage begins when conflict starts to emerge as a result of individuals starting to express their different opinions. SMTs need to develop skills to manage this stage effectively.

2.8.4.3 STAGE 3: NORMING

Vilbro (2003: 23) contends that things begin to improve in stage three. There is a sense of “we” and people take pride in being part of something and start cooperating instead of competing. Tuckman and Jansen (1994: 420) state that during this stage, the group realises that they are in this together and a sense of loyalty starts to develop. The IQMS underwrites cooperation among the staff members helping one another towards professional competency. Cooperation evolves during the process of team building and professionals should therefore work progressively towards stage three.

2.8.4.4 STAGE 4: PERFORMING

Vilbro (2003: 24) maintains that the team gains confidence and begins to use structured processes and procedures to communicate, resolve conflicts, allocate resources and relate to the rest of the organization. Tuckman and Jansen (1994: 420) claim that at this stage, the structure of a group is now fully accepted and functions well. Members share different viewpoints, but are open to accepting the

best solution (ibid). Once the performing stage is reached, the IQMS structures such as the DSG and the SDT would be well on their way to implementing the IQMS in a co-operative and collaborative manner.

2.9 CONCLUSION

This chapter provided insight into the traditional school inspection and supervision models and its failure to make the transition to the democratic principles that are entrenched in South Africa's national constitution. The change drivers that resulted in the adoption of the IQMS as educational policy and the principles underpinning the policy were discussed in some detail. Support structures for the implementation and management of the IQMS were explored at a theoretical level.

In the next few chapters we turn our attention to the practical investigation of how much buy-in the IQMS has had from grassroots educators and what their perspectives are on the policy and implementation of the IQMS.

Chapter 3 discusses the research methodology used in soliciting and analyzing educator responses on the implementation of the IQMS.

CHAPTER 3: RESEARCH METHODOLOGY AND PROCEDURE

3.1 INTRODUCTION

In this chapter the researcher will give an account of the research methodology used to conduct the empirical investigation.

3.2 REASONS FOR USING EMPIRICAL RESEARCH

Ntsholo (2002: 09-10) asserts that empirical research is observable, measurable, objective / real. Empirical research has been used in this work to provide practical weight to what otherwise would be mere theoretical conjecture.

3.3 PREPARATION FOR THE RESEARCH

3.3.1 PERMISSION

Van Dalen (1979) as cited by Mdimore (2004: 32) emphasizes that "before sending out the questionnaire, the researcher should obtain permission from the highest authority in each unit to contact respondents". In accordance with this, the researcher sent a letter requesting, permission from the District Manager (Appendix A) who gave approval (Appendix C). A copy of the questionnaire (Appendix B) was included in a letter requesting permission.

3.3.2 POPULATION AND SAMPLE

The researcher decided to conduct the research in Umlazi District. Umlazi District consists of four circuits, namely Phumelela, Chatsworth, Durban Central and Umbumbulu. The district was chosen as the researcher is currently serving as an educator in this area and has easy access to the schools in the area. The area is also viewed as representative of other districts in Kwazulu-Natal allowing results to be extrapolated. The researcher

sampled educators at all levels of management as they are the people ultimately responsible for implementing the IQMS.

Umlazi district has 177 secondary schools spread over the four circuits mentioned earlier. Each circuit is further divided into wards which are scattered over a large area. Quickly realizing that it would not be practical to draw respondents from every school in the district, the researcher restricted the sample to a few schools in each district. Theoretical precedent for this was drawn from Mthethwa (2004: 34) who citing Goddard and Melville (2001) points out that "it is often not practical or possible to study an entire population". Oakshort (1998: 38) reinforced this view indicating that a small subset of the population can give generalizable results.

Schools were sampled across the four circuits as follows:

Umlazi District	No. Secondary Schools	No. of schools selected	Total No. of Educators including SMTs selected in a Circuit	
Phumelela Circuit	41	4	3 098	25
Chatsworth Circuit	40	4	2 700	25
Durban Central Circuit	60	6	3 000	25
Umbumbulu Circuit	36	3	4 000	25
Total	177	17	12 798	100

The researcher used a simple random sampling technique to select the schools, with an approximate 10% school representation in each circuit.

Goddard and Melville (2001: 36) say, of random sampling, "it ensures that each member of the target population has an equal chance of being selected". Oakshort (1998: 34) says if the target population covers a wide geographic area, random sampling is used in order to select respondents from different parts of the population.

The researcher randomly allocated numbers to the 177 schools in the Umlazi District. The researcher then generated as many unique random numbers as the size of the sample would require. Out of the 177 schools 17 schools, were selected. The 17 schools constitute 10% of the total population. Every tenth school was picked. The selected sample of schools had a population of 510 educators, including SMTs. The researcher targeted 100 respondents which constituted 19.6% of the total population of educators. 100 questionnaires were sent out, 93 questionnaires were completed and returned. This constituted a 93% return rate which was sufficiently high to ensure the sample was representative and the findings valid.

3.4 RESEARCH INSTRUMENT

Goddard and Melville (2001: 41) define a research instrument as any device used to collect and measure data. Consistent with the aim of this study, the researcher decided that a survey would be used. Creswell (2003: 153) asserts that a survey provides a quantitative or numeric description of trends, attitudes, or opinion of a population by studying a sample of that population. Cohen and Manion (2004: 35) refer to a survey as the gathering of data at a particular point in time with the aim of describing the nature of existing conditions, identifying standards against which existing conditions can be compared and determining the relationships that exists between specific events. A survey was thus deemed the best methodology for this study.

3.4.1 QUESTIONNAIRE

A questionnaire is the data gathering instrument used in the survey. The researcher opted for a questionnaire because it best serves the needs of this study. According to McNeil (1990: 23) a questionnaire is a list of questions to be asked by the researcher. It is prepared in such a manner that, the questions are asked in exactly the same way to every respondent (ibid). Behr (1980), cited by Shezi (1999: 24), adds that a "questionnaire is a document

that is normally distributed to the respondents through the post." The respondents fill the questionnaire in their own time. Mahlangu (1997), cited by Mdimore (2003: 34), asserts that "questionnaires are used by researchers to convert the information directly given by people into data by providing access to what is inside someone's mind".

3.4.1.1 CONSTRUCTION OF QUESTIONNAIRE

This section deals with the construction of the questionnaire. Van Dalen (1979), Grim and Wozniak (1990) and Bailey (1987: 67) all assert that before a questionnaire can be constructed, "there are schedules of observation and ethical issues that need to be followed..." They enumerate these as:

- Give clear directions.
- Avoid psychological harm.
- State the aim and the importance of the research.
- Ensure confidentiality and anonymity.
- Offer to share the findings.
- Highlight the right of privacy.
- Get informed consent.
- Ensure the objectivity of the measurement.

When the above factors have been observed, threats to privacy, fear of embarrassment and sensitivity to harm are allayed. Dane (1990: 43) points out that the respondents become desensitised and they voluntarily subject themselves to the scrutiny that is inherent in the research.

The researcher used structured or closed-ended questions and unstructured or open-ended questions. Grimm and Wozniak (1990) as cited by Mdimore (2003: 35) assert that "a distinction is generally made between open-ended questions, or questions in which response categories are not specified, and fixed alternative or closed-ended questions in which the respondent selects one provided by the researcher".

3.4.1.2 CLOSED-ENDED QUESTIONS (STRUCTURED QUESTIONS)

The researcher used a mix of 21 closed-ended questions and one open-ended question. This is consistent with Van Dalen's (1978) recommendation also cited by Mdimore (2003: 35) that a "researcher must aim at using as many closed questions as possible, although there will always be information which is difficult to generate by closed question, thus open-ended questions are unavoidable in those cases."

Structured questions required respondents to rate statements. One of three responses was expected to each question:

- **Good** was used to indicate agreement with a statement.
- **Uncertain/Average** was used when the respondent indicated uncertainty about the validity of the statement or where the respondent rated performance/competence/knowledge as average.
- **Poor** was used to indicate that the respondent disagreed with a particular statement or rated performance/competence/knowledge as below average.

3.4.1.3 OPEN-ENDED QUESTIONS (UNSTRUCTURED)

The researcher employed an open-ended question to explore variables that were not covered by the structured question but may have been significant in the respondents' assessment of the situation.

Bailey (1987) as cited by Mdimore (2003: 36) confirms the importance of open-ended questions by noting that "an open-ended question has advantages when a variable is relatively unexplored or unknown to the researcher". In such cases the open-ended questions would enable the researcher to explore the variable better and obtain some idea of the spectrum of possible response (ibid). The last question of the questionnaire

thus made provision for respondents to freely express their opinions on the implementation of the IQMS.

3.4.1.4 ADVANTAGES OF A QUESTIONNAIRE

The researcher used the written questionnaire taking into consideration certain advantages that it has over other research instruments. Cohen and Manion (1989: 111-112) list the following advantages of the questionnaire:

- Affordability is the primary advantage of written questionnaires because it is the least expensive means of data gathering.
- Written questionnaire preclude possible interviewer bias.
- A questionnaire permits anonymity.
- Questionnaires permit respondents sufficient amount of time to consider answers before responding.
- Generally the data provided by the questionnaires can be more easily analysed and interpreted, than the data obtained from verbal responses.

The researcher is also aware of the fact that the written questionnaire has disadvantages.

3.4.1.5 DISADVANTAGES OF A WRITTEN QUESTIONNAIRE

According to Kidder and Judd (1986) as cited by Shezi (1999: 31) the disadvantages of the questionnaire are:

- Questionnaires do not provide the flexibility of interviews. In an interview an idea or comment can be explored. This makes it possible to gauge how people are interpreting the question.
- People are generally better able to express their views verbally than in writing.
- Questions can be answered only when they are sufficiently easy and straightforward.

- The questionnaire does not make provision for obtaining the views of more than one person at a time.

To address these limitations, the researcher deliberately designed questions that were simple, short and straightforward. The researcher was available to provide clarification where necessary.

3.4.2 VALIDITY AND RELIABILITY OF THE QUESTIONNAIRE

Huysamen (1989: 01-03) highlights two concepts of critical importance in social science research, namely validity and reliability.

3.4.2.1 VALIDITY

Validity refers to the degree to which that which is intended to be measured actually is measured. Sax (1979) cited by Mdimore (2003: 38) claims that "validity is the extent to which a test correlates with some criterion external to the test itself." In this study, questions were structured and organized to minimize misunderstanding and eliminate ambiguity.

3.4.2.2 RELIABILITY

Lowe, Smith and Thorpe (1991) as cited by Mthethwa (2004: 14) suggest that "reliability is a matter of how stable the results are. They (ibid) pose the question "If an instrument is administered on the same individual twice, will yield the same results?" This concern was addressed by using a pilot study to refine and finalize questions.

3.5 PILOT STUDY

It is imperative for a questionnaire be administered to a pilot group in order to refine and finalize questions. According to McNeil (1990: 34), the researcher tries out a questionnaire on a number of people who are similar to those who will be investigated in the actual research. A pilot study was launched to

validate that questions were suitable for the survey and to eradicate ambiguity. The pilot study helped the researcher to check for and correct errors before distributing a larger number of questionnaires.

Two schools were used in the pilot study. The first was the school in which the researcher was employed as an educator and the second was a neighbouring school. None of the respondents used in the pilot study were solicited for the final sample. The pilot study revealed that some questions were too long thus caused ambiguity. The questions were refined and the questionnaires were dispatched to the final respondents with confidence.

3.6 ADMINISTRATION OF THE QUESTIONNAIRE

After the pilot study was concluded, the researcher began administering the questionnaire. The distance between schools made it very difficult for the researcher to hand-deliver all questionnaires to the selected educators. Taking his cue from Kidder (1981), Mthethwa (2004: 40) suggests that "it is possible to cover a wide area and to obtain information from more people by means of a postal questionnaire". The researcher thus enlisted the help of the postal service to distribute questionnaires. Some questionnaires were posted and some were personally delivered by the researcher.

3.7 PROCESSING OF DATA

The researcher processed the data that had been collected from the respondents, by compiling frequency tables. The frequency tables reflected a continuum scale ranging from good to poor. All scores were added in their respective categories and percentages were calculated. The responses from educators were analysed and interpreted to highlight similarities, differences and trends.

3.8 LIMITATIONS OF THE STUDY

Factors that constrained the investigation were as follows:

- Respondents were tardy in returning completed questionnaires. Various factors played a mitigating role here. Many schools were engaged in preparations for the matric examinations. Several educators were writing private examinations. The questionnaire was administered during a period when the District Office had organized a number Further Education and Training (FET) workshops. Educator unions were engaging educators in a number of strikes demanding a 1:30 educator / pupil ratio and a general salary increase. Permission to conduct research was granted telephonically however there was a delay in receiving written permission from the District Office.
- The responses could not be controlled for apathy or honesty. Goddard and Melville (2001) as cited by Mthethwa (2004: 42) highlight that "a researcher has no right to expect total honesty from respondents". Some of the respondents will not care that much about an answer or will try to give a socially correct answer".

3.9 ETHICAL CONSIDERATON

Goddard and Melville, (2001) as cited by Mthethwa (2004: 43) note that "collecting data from people raises ethical concerns". These concerns range from taking care not to harm people in the research process to having due regard for the respondents' privacy. In the cover letter, the researcher assured the respondents that they would remain anonymous and even suggested that respondents could opt not to provide details of their identity or even the names of their schools.

3.10 CONCLUSION

The researcher has indicated in this chapter how well-established research principles were adhered to. The discussion provided the theoretical and practical considerations that informed the research methodology.

The next chapter provides both a qualitative and quantitative analysis of the data that was collected.

CHAPTER 4: PRESENTATION AND DATA

4.1 INTRODUCTION

This chapter collates and summarizes the data collected from the survey. It also provides a qualitative analysis of the data providing useful insights into educators' perceptions of the implementation of the IQMS.

4.2 ANALYSIS OF CLOSED-ENDED QUESTIONS

Structured, closed-questions were used to help the researcher profile respondents and evaluate their knowledge of and attitudes toward the IQMS. Other questions still, were framed specifically to gather information the success or failure of the IQMS implementation at the respondents' school. The section below categorizes and summarizes the information that was gathered.

4.2.1 PROFILE OF RESPONDENTS

This section summarizes the data collected on the gender of respondents, the age group that they belong to, their home language preference and their academic qualifications.

Table 4.1: Gender of respondents

Gender	Frequency	%
Male	42	45
Female	51	55
Total	93	100

Fifty-five percent of educators surveyed were female and 45% were male. The data provides a relatively balanced view of male/female perspectives of the IQMS.

Table 4.2: Ages of respondents

Age Range	Frequency	%
Under 30	15	16
31-40	51	55
41-50	24	26
Over 50	03	3
Total	93	100

The majority of educators, 55%, participating in the survey were between 31 and 40 years of age, with 26% between 41 and 50 years of age and only 3% over 50. A further 16% of educators were under 30 years of age. These figures provide the comfort of knowing that the most of the educators are seasoned professionals who have many years of experience in educational evolution. There is also sufficient youth in the sample population to ensure continuity and progression into senior educator and management roles.

Table 4.3: Home language preference

Home Language	Frequency	%
English	-	-
Afrikaans	-	-
IsiZulu	93	100
Xhosa	-	-
Sotho	-	-
Other (please specify)	-	-
Total	93	100

One hundred percent of respondents claimed that IsiZulu was their home language. This did not come as a surprise because the survey was conducted in black schools within the Umlazi District where most of the educators are of Zulu origin.

Table 4.4: Highest qualification

Qualification	Frequency	%
Lower than Matric	-	-
Matric	-	-
College/University Diploma	39	42
University Degree e.g. B.A.	27	29
Other post-graduate degrees	27	29
Total	93	100

Forty-two percent of the participants either had College or University diplomas. A further 29% had University degrees. A significant 29% of the sample population claimed that they had other post-graduate degrees. It is evident from these statistics that educators in the district are adequately qualified and actively engaged in furthering their education. This would suggest that their knowledge of educational development is current and that they are capable of taking ownership of the IQMS and translating it into a practical system for self-development and WSD.

4.4.2 KNOWLEDGE AND UNDERSTANDING OF THE IQMS INSTRUMENT

This section summarizes respondents' self-evaluation of their knowledge and understanding of the IQMS instrument. Valuable insights are provided on how well versed educators are in terms of base line (self) evaluation, the duties of the SDT, the duties of the DSG, educator performance standards, the PGP and the IQMS generally.

Table 4.5: Knowledge and understanding of baseline or self-evaluation

Self Evaluation	Frequency	%
Good	54	58
Average	30	32
Poor	09	10
Total	93	100

Fifty-eight percent of respondents indicated that their knowledge of baseline or self-evaluation was good, 32% indicated an average understanding and 10% admitted that they had a poor understanding of baseline evaluation.

The fact that 42% of the respondents did not have a clear understanding of baseline evaluation points either to ambiguity in definitions of baseline evaluation, insufficient training directed at exploring this concept, insufficient exposure of educators to IQMS concepts or a general apathy amongst educators in regard to baseline evaluation. This finding is particularly alarming in the view of the fact that most educators were already to have completed their baseline evaluation.

Gerber, Nel and Van Dyk (1992: 215) state that educators need to be aware of and engage in self-evaluation because it serves to modify their attitudes towards the job and adjust patterns of behaviour in an organization like the school. It is evident from table 4.5 that some educators are still unfamiliar with IQMS concepts.

Table 4.7: Duties of the Staff Development Team (SDT)

Staff development Team (SDT)	Frequency	%
Good	60	65
Average	27	29
Poor	06	06
Total	93	100

An encouraging 65% of respondents were aware of the duties of the SDT's, 29% of respondents had an average understanding and 6% indicated that they had a poor understanding.

The data collected from this section suggests that most schools have already introduced SDTs as an IQMS support structure. According to the NDoE (2003: 13) the SDT is responsible for assisting educators to develop a PGP. It is heartening to see that in most cases educator development is receiving priority.

Six percent of the respondents indicated poor understanding of SDT duties. A number of possible reasons could be suggested for this. Perhaps the SDTs are in place but do not inform the general educator community about its roles and functions. The educators in these schools may not have been privy to the IQMS documentation or intrinsically involved in its implementation. There could also just be general apathy amongst these educators in regard to the IQMS in general and the SDT duties in particular.

In those schools where educators have a poor knowledge of the duties of the SDT, the process of implementing the IQMS may be hindered.

Table 4.8: Duties of the Development Support Group (DSG)

Development Support Group (DSG)	Frequency	%
Good	42	45
Average	39	42
Poor	12	13
Total	93	100

Forty-five percent of respondents indicated that they had a good understanding of the duties of the DSG, 42% had an average understanding and 13% indicated poor understanding.

Although most educators (87%) had some knowledge of DSG duties only 45% indicated that they had a good understanding of the role and functions of the DSG. These statistics suggest that although most schools have established DSGs as IQMS support structures, 55% were still not drawing fully on the DSGs to assist them in professional development. It may be that principals in these schools have not yet emphasized the role and functions of DSGs. According to the NDoE (2000: 09) the DSG must discuss their evaluation with the educator and must provide feedback on classroom observation. If educators are not aware of the role of the DSG, as indicated by 13% of the respondents, tensions may arise and subsequently jeopardize the objectives of the IQMS.

Table 4.9: Performance standards for level-one educators

Performance Standards (PS)	Frequency	%
Good	42	45
Average	42	45
Poor	09	10
Total	93	100

Educators were asked to evaluate their understanding of performance standards for level-one educators. Forty-five percent of the respondents had a good understanding of performance standards for level-one educators, 45% had an average understanding, whilst 10% had a poor understanding.

An overwhelming 90% of respondents had either a good or average understanding of performance standards for level-one educators. This suggests that the SDTs have informed educators about the IQMS. Ivanicevich and Glueck (1986) as cited by Gerber, Nel and Van Dyk (1993: 442) assert that a performance standard is used to determine the extent to which an employee is performing the job effectively. It is, therefore, important for all educators to understand performance standards. It is evident from the data presented in table 4.9 that some educators (10%) do not understand the standards by which their performance will be measured. It can thus be inferred, that in these schools, educators have not fully taken ownership of the IQMS instrument and therefore, implementation may be hindered.

Table 4.10: Performance Growth Plan (PGP)

Personal Growth Plan (PGP)	Frequency	%
Good	51	55
Average	27	29
Poor	15	16
Total	93	100

This question asked educators to evaluate their knowledge of the PGP as an educator development tool. Fifty-five percent of respondents had good understanding, 29% indicated that they had average understanding and 16% of respondents acknowledged a poor understanding.

It is evident that in some schools, SDTs and DSGs have trained educators in all key areas of the IQMS including the educator PGP. However, for 16% of the sample it appears implementation of the IQMS may not have materialized.

If educators do not know what a PGP is, then it can be inferred that they have not developed their own growth plans, and if growth plans have not been developed, these will not be fed into overall school improvement plans and the objectives of the IQMS will not be met.

Table 4.11: General knowledge of the IQMS

IQMS-General Knowledge	Frequency	%
Good	48	52
Average	27	29
Poor	18	19
Total	93	100

This question polled educators about their general knowledge of the IQMS. Fifty-two percent responded positively indicating a solid understanding of the IQMS, while 29% indicated that they had average understanding and 19% evaluated their understanding as poor.

It is evident from table 4.11, that the majority of educators (52%) feel confident about their general knowledge of the IQMS policy requirements and the concepts and philosophy that underpin the policy. They appear to be ready for the implementation process. Twenty-nine percent of respondents indicated that they had an average understanding. These educators may be aware of the IQMS policy, but this instrument was perhaps not properly discussed with them. In those schools where respondents (19%) have a poor general knowledge of the IQMS, WSD may be delayed. General knowledge of the IQMS is improved through advocacy and training of educators. Where educators are not trained, they may be reluctant to implement the IQMS.

Table 4.12: Election of Staff Development Teams (SDT)

Staff Developmental Teams (SDT)	Frequency	%
Good	45	48
Average	33	35
Poor	15	17
Total	93	100

Educators were asked to evaluate participation in electing an SDT. Forty-eight percent of respondents responded positively, 35% indicated only partial satisfaction with the electoral process, whilst 17% indicated that educators in their school did not elect an SDT. As 17% of educators indicated that their schools have not elected SDTs, it can be concluded that some schools have not created suitable and mandated structures for the IQMS implementation or alternatively that election of such structures was not inclusive or transparent. Where the latter is the case educators may look upon the SDT with suspicion.

Chetty (1998: 69) asserts that transparency fosters mutual trust amongst all stakeholders and creates a system where every member is treated with respect and dignity. It is thus critical that SDT elections are inclusive and transparent.

Table 4.13: Educators have constituted a Developmental Support Group (DSG)

Developmental Support Groups (DSG)	Frequency	%
Good	45	48
Average	33	35
Poor	15	17
Total	93	100

Educators were asked evaluate to what extend and how a DSG was constituted at their respective schools. Forty-eight percent of respondents had

indicated satisfaction with the constitution of a DSG in their schools, 35% were only partly satisfied and 17% were not convinced that DSGs were correctly constituted in their schools. The high percentage of respondents (52%) that indicated only partial satisfaction or dissatisfaction with the constitution of a DSG in their schools suggests that educator mentoring is not taking place thus hindering the implementation of the IQMS. Greyvenstein, (1989) as cited by Van der Westhuizen, (1991: 554) regards the mentoring process as "an important element in the professional development of educators with a view to preparing for top management post in the teaching profession. Development Support Teams (DST) forms a core part of the IQMS research aims since it provides professional educator development".

Table 4.14: Educators have conducted self or baseline evaluation

Self or Baseline Evaluation	Frequency	%
Good	51	55
Average	30	32
Poor	12	13
Total	93	100

This question intended to ascertain whether or not educators had conducted self or baseline evaluation and whether or not they were satisfied with the process. Fifty-five percent of the respondents provided a favourable response, suggesting that most educators have conducted self or base-line evaluation. On the other hand 32% were indicated either partial satisfaction with the evaluation or uncertainty as to whether or not self or baseline evaluation took place at all. A further 13% suggested that they were dissatisfied with the process of baseline evaluations conducted at their schools or alternatively that this evaluation had not taken place at all. Hoyle and McMahon (1986: 101) assert that educator evaluation is critical in assessing an educator's work and serves as a useful strategy for overall school improvement.

It can be inferred from the above data that some schools appear to be grappling with the implementation of the IQMS.

Table 4.15: Membership of and participation in the Development Support Group (DSG)

Member of Development Support Group	Frequency	%
Good	69	74
Average	05	06
Poor	19	20
Total	93	100

This question was formulated to gauge the level of participation in and representation on the DSG. The overwhelming 74% of respondents indicated that they were members of the DSG and were satisfied with the level of participation in the DSG. Six percent of respondents indicated were either unsure of their status in relation to the DSG or were only partially satisfied with their level of participation in the DSG. A further 20% of respondents indicated that they were not members of the DSG or alternatively were not satisfied with their participation in the DSG.

It is evident from table 4.15 that most schools have elected structures like DSGs. However, some educators (20%) were not clear about their involvement in the DSG. This suggests that plans to support educators for professional development may be compromised or may not be fully articulated. A DSG is supposed to have the following representation: an HOD who is an immediate supervisor to an educator and an appraisee's peer. According resolution 8 of the Education Labour Relations Council (2003: 13) the DSG is responsible for assisting the educator to develop a Personal Growth Plan (PGP).

Table 4.16: Are Personal Growth Plans (PGPs) in place?

Performance Growth Plan (PGP)	Frequency	%
Good	57	61
Average	24	26
Poor	12	13
Total	93	100

This question asked educators whether or not they had a PGP. Sixty-one percent of the respondents asserted that they did have a PGP, while 26% of respondents were uncertain and 13% indicated they did not have a PGP.

An alarming 26% of educators were unsure of whether or not they had a PGP. This suggests that they are either unfamiliar with the concept of a PGP or that they are unclear on who is responsible for drafting the PGP. A further 13% indicated that they had no PGP at all suggesting that principals have not prioritised educator professional developmental.

Table 4.17: Evaluating the impact Development Support Groups (DSGs)

Educator-support from DSG	Frequency	%
Good	54	58
Average	15	16
Poor	24	26
Total	93	100

This question asked educators to evaluate support from their DSGs. Fifty-eight percent of respondents indicated that they had strong support from their respective DSGs, while 16% suggested mediocre support and 26% claimed that they did not receive support from the DSG.

It is evident from table 4.17 that most educators are receiving professional support from DSGs. However, 16% of educators suggest that there is room for improvement in the amount and/or quality of assistance they receive. A significant percentage (26%) of respondents suggested that they were not receiving support from their DSGs. This could seriously compromise the implementation of the IQMS in these schools and needs to be addressed urgently.

Table 4.18: Educator training for the IQMS

Educator Training on the IQMS	Frequency	%
Good	45	48
Average	39	42
Poor	9	10
Total	93	100

This question aimed at determining whether or not educators received training on the IQMS and to poll their level of satisfaction with the quantity and quality of the training. Forty-eight percent of respondents suggested that they received good training. Forty-two percent classified the training they received as average, whilst 10% of respondents claimed to be poorly trained.

Looking at the information in table 4.18, it is clear that most schools have conducted the IQMS training. It is proposed that if training had been thorough, educators would take the ownership of the IQMS implementation and would be willing to be appraised. The statistics expose that 10% educators have not been trained suggesting some schools may not yet have been introduced the IQMS instrument. Thurlow, (2001) as cited by Jeffer (2002: 20) asserts that "a policy is a merely a document, thus even the best policies do not implement themselves". On-site regular training is required for the IQMS to be an effective vehicle for school improvement.

Table 4.19: Understanding the IQMS document

Educator understanding of the IQMS document	Frequency	%
Good	48	52
Average	24	26
Poor	21	22
Total	93	100

This question requested that educators share how well or poorly they understood the IQMS policy document and other supporting documents. Fifty-two percent of the educators who participated in this survey indicated that the IQMS documents were accessible and easy to comprehend, whereas 26% evaluated their understanding of the documents as average. Twenty-two percent felt that they had a poor understanding of the IQMS documents.

It is evident from table 4.19 that some educators do understand the IQMS document. However, the high percentage of educators who indicated an average or poor understanding of the IQMS documents remains a concern. It is likely that the schools from which these educators hail have not started the IQMS implementation as yet or at best have lagged behind in the implementation of the IQMS.

Table 4.20: Understanding the Performance Measurement (PM)

Educator Knowledge of Performance Measurement (PM)	Frequency	%
Good	60	65
Average	18	19
Poor	15	16
Total	93	100

This question asked educators to evaluate their knowledge of the PM. Sixty-five percent of educators responded positively. Nineteen percent rated their knowledge on the subject as average and 16% thought that their knowledge of the PM was poor. It is clear most educators know what the PM is.

An understanding of what the PM is and how it works is important because it can be makes performance appraisal transparent and provides an instrument to give feedback to the employee. The PM is also related to salary adjustments. A lack of knowledge of the PM places the transparency of the appraisal process at risk and can subvert trust.

Table 4.21: Appraisee input into the formation of the appraisal panel

Every appraisee had a say in the formation of the appraisal panel	Frequency	%
Agree	39	42
Uncertain	39	42
Disagree	15	16
Total	93	100

Forty-two percent (42%) of respondents agreed with the statement that every appraisee had a say in the formation of the appraisal panel. Disturbingly, there were also 42% of respondents who were uncertain about this. Sixteen percent of the respondents suggested that they had little or no say in how the appraisal panel was constituted. This is contrary to the democratic principles of the IQMS.

It is alarming to note that up to 58% of the respondents could question the legitimacy of the appraisal panel as they do not rate their involvement in the election of the appraisal panel positively. It is even possible that IQMS structures such as SDT and DSG, which were to have been democratically

elected, may in these cases have been imposed upon educators by principals or HODs. Developmental appraisal may be compromised if this is the case.

Table 4.22: Educator approval of the IQMS as an evaluative tool

Educators approval of the IQMS as an evaluative tool	Frequency	%
Good	33	36
Average	33	35
Poor	27	30
Total	93	100

This question asked educators for an approval-rating of the effectiveness of the IQMS as an evaluative tool. Thirty-six percent of respondents indicated that they approved of the IQMS as an evaluative tool, whilst 35% were uncertain and 30% rated it poorly.

It is clear from table 4.22 that although many educators approved of the IQMS as an evaluative tool, there were still a number of detractors. This finding could be attributed to the poor marketing of the IQMS by the SMT and insufficient or ineffective training. It can be concluded that some schools are lagging behind in introducing the IQMS as an evaluative tool.

Table 4.23: Educators know what the School Improvement Plan (SIP) is

Every educator is aware what School Improvement Plan (SIP)	Frequency	%
Good	57	61
Average	27	29
Poor	9	10
Total	93	100

The majority of respondents (61%) indicated that they were aware of what a SIP is, whilst 29% rate their understanding of what a SIP is, as average. Ten percent of respondents have a poor understanding of what a SIP is.

The 49% of respondents who expressed reservations about their knowledge of the SIP highlight that some schools not yet have progressed beyond individual appraisals and taken a holistic look at the school. According to Hopkins (1998: 1), a SIP is an approach to educational change that enhances learner performance and manages the change. Failure to understand what a SIP is and how it is to be drafted, may seriously jeopardize the successful implementation of the IQMS.

4.3 ANALYSIS OF OPEN-ENDED QUESTIONS

One of the questions in the questionnaire made provision for respondents to freely articulate opinions on the implementation of the IQMS. Sadly 23% of respondents decided not to comment. This may well have been indicative of time constraints. It may however indicate that some educators have not truly engaged with the IQMS and therefore have not formed an opinion on the subject.

The 77% of respondents who did respond to the open-ended question provided a wide array of views both in support and critical of the IQMS implementation.

Some were critical of classroom observations, likening it to classroom inspections and suggesting that it would again cause educators to be on the defensive (as was the case with the inspection model).

In a study conducted by Goba (2002: 36), educators saw no need to have performance appraisals as they felt it amounted merely to a fault-finding mission and served only to challenge the educator's confidence.

Some respondents were concerned about the NDoE's failure to give exact timeframes or management plans. This concern again underscores that educators are not sufficiently familiar with the IQMS implementation guidelines as these timeframes are clearly outlined in current IQMS guides and policy documents.

Responses to the open-ended questions provide clear evidence that there is resistance and reluctance among educators to implementing the IQMS. Many of the respondents stated that they are already overloaded with work, and the general perception is that the implementation of the IQMS merely adds to this burden.

Despite some of the negative comments, some respondents acknowledged that the implementation of the IQMS could assist educators to develop teaching strategies which will ultimately benefit the learner. A few respondents highlighted that educators would become aware of their strengths and weaknesses from a third-party stance and this reflection could spur on further professional and personal development.

There was some scepticism regarding salary and grade progression, with some respondents feeling that this would not materialize. As one respondent indicated "IQMS is another carrot which the Department is dangling in front of educators to fool them into believing that they will be rewarded for hard work".

Even though opinions about the value of the IQMS may vary widely, it is clear that its implementation is causing educators to reflect on their positions within the teaching and learning environment. Educators are again reflecting on education, the role of the educator, the role of the learner and the community in general. Education is being seen as both a product and instrument of change; but most importantly, education is seen as dynamic and not stagnant.

4.4 CONCLUSION

This chapter has collated data from the survey and attempted to provide both qualitative and quantitative insights into the perspectives that educator-respondents from secondary schools within the Umlazi District have of the implementation of the IQMS. Recommendations, based on these findings, are made in the next chapter.

CHAPTER 5: SUMMARY OF FINDINGS, RECOMMENDATIONS AND CONCLUSION

5.1 INTRODUCTION

This study set out to investigate the implementation of the IQMS in secondary schools within the Umlazi District and to evaluate the perceptions that educators in these schools have of the IQMS implementation.

The survey has provided invaluable data which is summarized in this section as observations. The researcher has extrapolated and formulated from these observations, recommendations that he hopes will benefit the education community as a whole.

5.2 FINDINGS

a. In some schools educators do not understand the IQMS instrument

There is a possibility that concepts within the IQMS instrument are too complex to grasp as indicated in table 4.8 where respondents (13%) stated they do not understand the IQMS instrument. If educators do not understand the IQMS structures like SDTs and DSGs for example, implementation will be problematic and will cause more stress among educators. Convey (1996: 142) asserts that when stress and pressure amount, people start yelling over-reacting cynically, critically or silently about challenges encountered.

b. Advocacy and training programmes in respect of the IQMS are ineffective in some schools

Educators indicated that they were not trained to carry out the duties of the SDTs and DSG as evidenced in table 4.8. Advocacy and training is the starting point of the IQMS because it is where educators get a global idea about the IQMS and where common concerns may be raised. Advocacy and training leads to an ethos of trust where educators work together solve

problems that the IQMS may present. Jones (1980), as cited by Chetty (1998: 69), asserts that "an atmosphere of trust is imperative in order for professionals to work together harmoniously".

c. Certain IQMS structures are not yet in place in some schools

Evidence in table 4.15 indicates that there is reluctance among educators to implement the IQMS, as structures imperative for such implementation are not yet in place. Thurlow and Ramnarain (1996) cited by Hlatshwayo (2003: 17), assert that "every school is required to establish an elected Staff Development Team". Among the responsibilities of the SDT is the initiation of the appraisal process, facilitating appraisal training and ongoing support, the preparation and the monitoring of a management plan for appraisal. Bailey (1987: 99) concurs with Thurlow and Ramnarain (1996) when he suggests that SDTs must be prepared to re-examine the organizational assumptions about the best ways of working together, to test them against changing educational conditions and requirements and to re-cast their roles and responsibilities in response to the review. It is noted with concern that structures for such a review and re-examination are non-existent in some schools.

d. Educators feel that the IQMS is an additional burden to the already overloaded workloads

The NDoE has devised the Further Education and Training (FET) which is to be implemented in 2006, in all secondary schools. Educators are therefore under pressure to cope with both IQMS and FET concepts. Data in table 4.22 and the responses to the open-ended question are evidence that respondents feel frustrated at having to carry the perceived additional load of implementing the IQMS. There are also claims that morale is being negatively impacted.

e. Educators are sceptical about grade and salary progression

Evidence from the open-ended question indicated that some educators are sceptical about grade and salary progression. Educators need urgent

clarification on the sensitive process of grade and salary progression. This issue has become a focal point of educator-interest. It would appear that some educators have taken a reductionist view of the IQMS implementation, equating it solely to an opportunity to achieve grade and salary progression. These educators are neglecting personal and professional development aspects entrenched in the IQMS doctrine.

5.3 RECOMMENDATIONS

a. In-service training for educators on the IQMS instrument should be conducted by SMTs in every school

In-service training should be facilitated at every school without tampering with teaching time. It is recommended that the in-service training should take place after regular school hours. Educators should be offered the opportunity to ask questions with regards to the implementation of the IQMS and clarity should be provided on who is expected to own and implement it. Role and responsibility assignment should be unambiguous. In-service training will necessitate complete inclusivity and transparency on the side of the SMT. Chetty (1998: 69) affirms that transparency fosters mutual trust amongst all stakeholders and creates a system where every member is treated with respect and dignity.

b. The NDoE should organize re-training programmes for SMTs to capacitate them to conduct the IQMS workshops with educators in their respective schools

Since the majority of respondents expressed concern that workshop facilitators seem to lack confidence and do not appear to be communicating and reinforcing the same key IQMS messages, re-training programmes for SMTs is urgent. Failure at this level will not have in the desired result of producing competent and skilled workshop facilitators, who will in turn cascade information in a meaningful way to their fellow colleagues. McMahon (1986: 127) assert that competent professionals are those educators who

carry out their jobs successfully. Experts who are committed to thorough and intensive training should be recruited to retrain educators.

c. The NDoE should clarify the sensitive process of salary and grade progression to allay educators' skepticism

The NDoE needs to actively counter the tendency to reduce the IQMS implementation to a mere opportunity for salary and grade progression. The understanding of certain educators needs to be re-keyed to focus on professional educator development and the production of self-reliant schools. Van DeVenter and Kruger (2003: 234) confirm that in keeping with the current international trend towards democratisation, there is a tendency to move away from totally dependent public schools to self-reliant schools with competent school-based management.

d. The NDoE should engage in follow-up programmes with the schools to ensure structures are in place for the effective implementation of the IQMS

For the IQMS to be successfully implemented, democratically elected institutional structures such as SDTs and DSGs need to be in place and functioning optimally. All members must have their respective duties and responsibilities clearly articulated. Chetty (1998: 69) maintains that transparency is about self-disclosure and is also determined by how comfortable we feel in revealing ourselves to others.

SDTs and DSGs need to build effective communication channels to cascade information to educators timorously so that they too can keep abreast on IQMS-related matters. DSGs should fulfil their mandate as educator mentoring and support. The NDoE should engage in follow-up programmes with the schools to ensure structures are in place and functioning effectively. This is the only way to ensure effective implementation of the IQMS.

e. Educators should take ownership of the IQMS and be encouraged to perceive it as a vehicle for self-empowerment and self-mastery

Things like salary and grade progression should not overshadow the NDoE's vision of the IQMS. The vision, simply stated, is to transform schools into self-reliant organizations that facilitate learner academic excellence enabled by persistent educator development. Both salary and grade progression are reward systems based on material gain. However educators need to realize that professional and personal development is more beneficial than the material benefits of salary and grade progression. The rationale for the IQMS is to develop competent professionals who develop high levels of esteem through self-empowerment and personal mastery. The implementation of the IQMS affords educators the opportunity to develop holistically as well-rounded human beings. It also promotes self-efficiency and efficacy. Bandura (1997) as cited by Rice (1987: 75) claims that "self-efficacy is the perfection of capability, the belief that we possess personal skills and performance abilities that will enable us to act correctly and successfully in given situations".

5.4 CONCLUSION

This study investigated the implementation of the IQMS within the Umlazi District of KwaZulu-Natal and the perception that educators in these areas have of the IQMS and its implementation. The findings, insights and recommendations made herein have broader applicability though.

A key insight is that educators feel that they are already overburdened by curriculum renewal demands and consequently view the IQMS implementation as an additional burden. This is a major threat to the success of the IQMS implementation and should be actively countered. Educators need to be encouraged to latch on to the developmental impetus of the IQMS, seeing the IQMS as a vehicle for self-empowerment and self-mastery.

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APPENDIX A

P.O. Box 72982
Mobeni
4160

16 May 2004

The District Manager
Umlazi District
Private Bag X03
Umlazi
4031

Dear Sir

PERMISSION TO CONDUCT RESEARCH

I kindly request your permission to conduct research in some of the high schools within your jurisdiction. I am investigating, An Investigative Study into the Implementation of the *Integrated Quality Management System (IQMS)*.

This research is in part fulfillment of my M.Ed degree carried out at the University of Zululand (Durban – Umlazi Campus) under the supervision of Dr. M.K.K. Chetty.

Information gathered during the process of this research will be treated as strictly confidential and all respondents will remain anonymous.

As the researcher, I offer to share my findings with interested parties and trust that they will find them to be useful to other end-users and prospective researchers alike.

Thank you.

Yours faithfully



CUTHBERT THEMBINKOSI BUTHELEZI

APPENDIX B

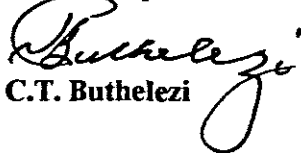
Dear Colleague

I am currently conducting a research towards my M-Ed degree (Master of Education) through the University of Zululand, under the supervision of Dr. M.K.K. Chetty. The researcher is concerned with the implementation of the Integrated Quality Management System (IQMS).

I have taken this opportunity to write to you as one of the selected respondents, in order to seek your assistance in acquiring information about your experience with regards to this research study. The fact that you have been chosen as a respondent is quite co-incidental. The area in which you live, as well as you, have been randomly selected for this survey.

All information gathered will be regarded as CONFIDENTIAL and no personal details of any educator/respondent will be mentioned in the findings nor will any of the results be related to any particular educator or school.

Your Co-Operation will be appreciated


C.T. Buthelezi

B.Ed; HDE; B.A.

Strictly Confidential

Questionnaire

The Investigative study into the Implementation of the Integrated Quality Management System (IQMS) in Secondary Schools within the Umlazi District

Questionnaire

Instruction to respondents

- 1. Please respond to the questionnaire**
- 2. Use a cross (X) in the chosen response**

Question One:**DEMOGRAPHIC INFORMATION**

1.1

SEX	
Male	1
Female	2

1.2

AGE GROUP	
Under 30	1
31-40	2
41-50	3
Over 50	4

1.3

HOME LANGUAGE	
English	1
Afrikaans	2
Zulu	3
Xhosa	4
Sotho	5
Other (please Specify)	

1.4

MY HIGHEST QUALIFICATION IS	
Lower than Matric	1
Matric	2
College/University Diploma	3
University Degree e.g. BA	4
Other post University Degrees	5

1.5

I AM AN EDUCATOR IN	
The Junior Secondary School	1
The Senior Secondary School	2

SECTION: 2

KNOWLEDGE AND UNDERSTANDING OF THE IQMS INSTRUMENT

How would you describe your knowledge of the IQMS instrument?				
		Good	Average	Poor
2.1	The base-line or self evaluation?			
2.2	Duties of the Staff Development Teams			
2.3	Duties of the Development Support Group			
2.4	Performance standards for level one educators			
2.5	Your understanding of the Performance Growth Plan			
2.6	Your general knowledge of IQMS			

SECTION: 3

MANAGEMENT OF THE IQMS

Indicate whether your school has engaged in the following strategies for the implementation of the IQMS				
		Agree	Uncertain	Disagree
3.1	Our school has elected the Staff Development Team			
3.2	Teachers have formulated their Development Support Groups			
3.3	Teachers have conducted self evaluation or baseline evaluation			
3.4	I am a member of the Development Support Group			
3.5	I have a Performance Growth Plan			
3.6	My Development Support Group supports me to develop as a teacher			

SECTION 4

MANAGEMENT OF THE IQMS

To what extent do you agree with the following statements				
		Agree	Uncertain	Disagree
4.1	In our school teachers were trained about IQMS			
4.2	I understand the IQMS document			
4.3	I know what Performance Measurement are			
4.4	In our school everybody is aware of the duties of the Staff Development Team			
4.5	In our school every appraisee has a say in the formation of the appraisal panel			
4.6	In our school everybody has been workshopped on IQMS			
4.7	Every teacher is aware of developmental cycles			
4.8	In our school everybody is aware of the important of summative Evaluation			

SECTION: 5

Factors that hamper or support the implementation of IQMS				
		Agree	Uncertain	Disagree
5.1	My opinion is that teachers approve of the IQMS as an evaluation tool			
5.2	I think the implementation of the IQMS will not be successful			
5.3	The SMT has a critical role to play in facilitating IQMS			
5.4	The salary progression and grade progression expectation by teachers will enhance the implementation process			
5.5	The main purpose of IQMS is to attain salary progression			
5.6	The key objective of IQMS is grade progression			
5.7	The main reason for the implementation of IQMS, is to promote Whole School Development			

SECTION: 6

6.1 Kindly state your views about the implementation of the IQMS

.....

.....

.....

.....



**UMBUMBULU DISTRICT OFFICE
PRIVATE BAG X 1022
9150221
UMBUMBULU. 4105**

**TEL: (031) 9150036; 9150001;
9150222**

FAX: (031) 9150189

Enquiries: BDF. NGCOBO

15 June 2004

APPENDIX C


**MR C.T. BUTHELEZI
Isolemamba High School
P.O. Box 72982
MOBENI
4060**

Dear Sir

**REQUEST TO CONDUCT RESEARCH ON INTERGRATED QUALITY
MANAGEMENT SYSTEM) (IQMS**

1. Your letter the above subject refers.
2. Permission is hereby given for you to conduct research in some of our schools.
3. Principals have been alerted to that effect.
4. However your interaction with the schools should take into account teaching and learning times at schools
5. I wish you the best of luck in your studies.

Yours faithfully


WARD MANAGER