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DECLARATION

I Zukiswa Mbulawa declare that this thesis is my own work and that all the sources cited or quoted have been duly acknowledged.

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Student's Signature                      Date
DEDICATION

I dedicate this research to my husband, Xolani Mbulawa for his support and encouragement during the hard times and also to my twins, Uviwe and Avuyile.
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My appreciation and thanks goes to:

- The God Almighty who made this possible for me to achieve.
- My husband who supported me all the way and was always there with the helping hand and all the nights he spent with me researching information.
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ABSTRACT

The Department of Basic Education introduced the Integrated Quality Management system in 2003. This was an integration of the three systems, Developmental Appraisal System, Whole School Evaluation System and Performance Measurement System. The system was seen as to be the one that would allow teachers to play a vital role in assessing their own progress, and would integrate this with the necessary evaluation strategy for the professional development of teachers and monitoring of the quality of teaching and learning in schools.

The purpose of this study was to research an evaluation of the Integrated Quality Management System impact in schools of the Mdantsane Area. The objective of the study was to establish whether the IQMS has addressed the concerns and needs of the educators and also establish their views on IQMS.

The literature was reviewed to get more information on the key concepts of the IQMS and get to understand how the system should be implemented. Both quantitative and qualitative research methods have been used to get to probe the views of the educators and how the system impacts in schools. The data collected was analyzed by means of frequency tables and charts using statistical methods.

It was concluded that educators still do not understand the policy document of IQMS and more training on the implementation of IQMS was recommended. The support and monitoring from the District Office needs to be strengthened.
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CHAPTER 1: INTRODUCTION & BACKGROUND

1.1. INTRODUCTION

The Integrated Quality Management System (IQMS) is the outcome of an agreement that was reached in the Education Labour Relations Council in 2003 (Resolution 8 of 2003). The IQMS is informed by Schedule 1 of the Employment of Educators Act (76 of 1998), whereby the Minister is required to determine the performance standard of educators. Each individual educator’s performance must be measured against the stipulated performance standard of the IQMS document. A four – point rating scale is employed to determine the level of performance for each educator. The rating provided by the Development Support Grouping (DSG), clearly indicates areas in need of development as well as the strength of individual educators that need to be enhanced. It integrates the Development Appraisal System (DAS) that came into being on the 28th July 1998, (Resolution 4 of 1998), the Performance Measurement System (PM) that was agreed to on the 10th April 2003 (Resolution 1 of 2003) and Whole School Evaluation (WSE) (Chisholm, et al, 2005:10).

Teachers in South Africa, especially in black schools were not subjected to any kind of evaluation. It is possible that this situation has contributed towards the unsatisfactory results in learner achievement, and also to teachers who are demotivated. In order to enhance high level of academic achievements for the learners and effective teachers a system had to be out in place, the Integrated Quality Management System (IQMS). Performance management is the process of assessing progress towards achieving predetermined goals. It involves building on that process, adding the relevant communication and action on the progress achieved against predetermined goals and helping organizations achieve their strategic goals.

Performance management is a means of getting better results from the organization, its teams and individuals, by understanding and managing performance within an agreed framework of planned goals, objectives and standards (GSSE, 2003). Grobler et al (2000:261) maintain that performance management is a broader term than performance
appraisal, emphasizing the use of all the management tools, including performance appraisal. Tools such as reward systems, job design, leadership and training should be part of a comprehensive approach to managing performance. Performance management plays a vital role in helping the organization achieve its goals by providing a link between strategic planning and performance appraisal.

“Public service delivery improvement continues to be a challenge that requires the commitment of all public servants to work towards, not only to meet government’s objectives but also satisfying the aspirations of members of the public for access to quality services and a better life for all. Nothing should justify failure to respond to these expectations, as they are legitimate and noble”. Geraldine J. Fraser-Moleketi former Minister for Public Service and Administration (www.dpsa.gov.za/batho-pele/index.asp)

As compared to commercial institutions, government agencies face a unique set of challenges when trying to manage performance and achieve their strategic goals and initiatives. Their mission and budgets are often decided externally. This challenge, in particular, increases the need for greater collaboration within the agency to ensure effective implementation and success. Additionally, departments face the uphill task of meeting their goals without direct control of shrinking budgets and resources. This furthers the need for managing performance at every step along the way. To ensure successful execution of a mission, government agencies must develop a strategic plan. Service delivery imperatives and the quest for improved performance in the Public Service and the Private Sector led to the development of Performance assessment tools. In the South African context the Public Service is seen as not performing as compared to the Private Sector. This perception led to the Public Sector in the national and provincial sphere of government having new performance management and development systems (PMDS) in place by 1 April 2001. (www.dpsa.gov.za)

Another factor that impacted on performance management in the Public Service was the development of proposals for a new pay progression system, a system that is intended to be based partly in performance. A thorough assessment by the Department of Public Service and Administration (DPSA) for the period March to May 2001 indicated
that, by and large, departments were unable to meet the regulatory requirements by the required date. Nine national departments and one province started implementing their new systems. Even in those cases where implementation is taking place, it is too soon to tell what extent these systems have actually resulted in improved individual, team and organisational performance. (www.dpsa.co.za)

Despite the above, and what appears to reflect a negative scenario of performance management in the Public Service, the past three years have nevertheless seen a remarkable growth in the understanding of new paradigm of performance management and development that needs to be instilled in the Public Service. (www.dpsa.gov.za).

1.2. STATEMENT OF THE PROBLEM

South African educators needed a system that will solve the problems they have experienced with the previous evaluation strategies. At its introduction, the IQMS was seen to be the one that would allow teachers to play a vital role in assessing their own progress, and would integrate this with the necessary evaluation strategy for the professional development of teachers and monitoring of the quality of teaching and learning in schools. The IQMS signaled a new approach to performance evaluation in the South African education system. From an education perspective the evaluation systems prior to IQMS, were seen as negatively focused, backward looking, judgmental, subjective, unreliable and to have a top-down orientation. The IQMS approach, therefore, presented an opportunity for the department to turn these negatives into positives and begin to build a quality education system. IQMS is described as a holistic approach in pursuit of continuous improvement as well as a monitoring and evaluation tool to ensure educator development which in turn will lead to a quality education (Resolution 8: ELRC, 2003).

However, there is a perception that IQMS has not turned negatives into positives and the problem statement hinges on this perception.
1.3. RESEARCH OBJECTIVES

- The main objective is to evaluate the impact of IQMS in schools.
- To establish whether IQMS has addressed the concerns and needs of Educators and to establish educator's views on IQMS.

1.4. RESEARCH QUESTIONS

- Did implementation of IQMS improve teaching and learning?
- Do educators understand the IQMS, its content and objectives?
- What are the educators’ attitudes towards IQMS document?
- What are the educators’ attitudes towards the IQMS implementation?

1.5. SIGNIFICANCE OF THE STUDY

The significance of the study is to identify the impact of IQMS, in relation to improving teaching and learning, and also creating a platform to measure and reward educator's performance. It is also to investigate how informed and receptive the educators are on IQMS and whether they understand the end result of IQMS. It also examines the experiences and views of the educators on how IQMS is managed and the extent to which management plays in maintaining success or failure of IQMS implementation.

The research will assist in helping disclose the appropriateness or the shortcomings of the system from the perspective of the schools. Some systems are brought into schools without the benefit of extensive prior testing or verification which in most cases lead to failure. The study will further identify gaps in the system and open a room for improvement.
1.6. LITERATURE REVIEW

The study is based on the review of literature, which has been stipulated in the Constitution of the Republic of South Africa and policy documents of the Department of Basic Education and also the Education legislations. Numerous journals, articles, books and internet resources have been utilized to expound the main components of the quality assurance instrument.

The new Constitution of South Africa which came into being in 1996, legislated the need for transformation. Within the broad context of transformation, according to Thurlow and Ramnarain (2001:1), the National Department of Education has refocused the vision and direction of the South African Education System through a series of policy initiatives. One of these policies is the IQMS. The IQMS was agreed on by the Department of Education and Teachers Unions for the purpose of addressing some problems in the previous educator monitoring, inspection and appraisal system.

The research studies referred to by Taylor and Vinjevold (1999:230-235), as well the national Department of Education Document (2006, cited by de Clercq, 2008:7), indicate that teachers performance in South African schools remains low, and contributes significantly to the poor learners' results of the last decade. Chetty et al (1993:2) also argue that there was a need to move away from a summative, judgemental and authoritarian evaluation strategy which was largely inspectorial and bureaucratic, rather than promoting professional development. Teachers were really not happy about the inspectorial and bureaucratic evaluation system which was in place, and they felt that there was a need for another instrument that would measure their performance through some kind of developmental appraisal. Chetty et al (1993:1) point out that 'appraisal per se' was not rejected by the majority of teachers, but they wanted appraisal to be a part of their professional development and not a mechanism enforcing control.
1.7. RESEARCH METHODOLOGY

The research will be conducted in three different schools categories (Primary, Junior and High school), in the Mdantsane area, and will use both quantitative and qualitative approach because it is concerned with feelings and ideas of the educators. 9 schools will be randomly selected and 5 teachers from each school will also be randomly selected. Sampling is generally viewed as a process of selecting one or more cases for investigation for the purpose of generalizing to a larger universe of such cases.

Both qualitative and quantitative approaches will be used in this research to get to probe the views of the educators on the impact of the Integrated Quality Management System.

1.8. DATA ANALYSIS

The purpose of analysis is to reduce data to an intelligible and interpretable form so that the relations of research problems can be studied, tested and conclusions drawn.

The sampling of data will be 5 educators per school which is relatively small and therefore manual analysis will be applied. Content analysis will be used to analyse data. The data collected by questionnaires may be either qualitative or quantitative. Questionnaires do however lend themselves more to quantitative forms of analysis. This is partly because they are designed to collect mainly discrete items of information, either numbers or words which can be coded and represented as numbers (Blaxter, 2006 : 215).
1.9. DELIMITATION

The area of study will be selected schools in the Mdantsane area from different categories. The researcher does not see these schools as exceptional. The names of all participants will be changed to protect those concerned. The researcher will not generalize the findings because variables may differ in different contexts within one country. For example, the experience of the IQMS in the rural area might not be the same as in the urban area.

1.10. ETHICAL CONSIDERATION

Ethical behavior of a given profession or group is very dynamic and is driven by various factors, such as the geographical settlement (urban, semi-urban, rural and extremely rural), socio-economic environment (economic stability, community life style, poverty rating), thus the study will be versatile to accommodate the different ethic behavior. Confidentiality and the anonymity of respondents will be ensured. Participants will receive a full, non-technical and clear explanation of the tasks expected of them so that they can make an informed choice to participate voluntarily in the research.

The informed consent form signed by participants should also assure them of the parameters of confidentiality of the information supplied by them.
1.11. OUTLINE OF CHAPTERS

This study will be organized into five Chapters:

Chapter One consists of the introduction, background to the research problem, statement of the problem and research methodology.

Chapter Two presents a literature review framework that relates to the policies that informs the Integrated Management System.

Chapter Three outlines the research methodology and design used to investigate the impact of IQMS in schools.

Chapter Four outlines the analysis and interpretation of the empirical data collected by means of interviews and questionnaires.

Chapter Five discusses findings and draws conclusions and provides recommendations based on the findings.
CHAPTER 2: LITERATURE REVIEW

2.1. INTRODUCTION

A review of literature is aimed at contributing towards a clearer understanding of the nature and meaning of the problem that has been identified. Strydom, et al. (2002:128) explain why literature review is important. It is an excellent source for selecting or focusing on a topic, as one reduces the chances of selecting an irrelevant or outdated topic or focus by investigating what has already been done in a particular problem area. The researcher will be looking at the theory that underpins the study, analyse the Development Appraisal System and Whole School Evaluation on how it impacts on the IQMS and also discuss the roles and responsibilities of the structures that are involved in the IQMS.

2.2. THEORY UNDERPINNING THE STUDY

The perceptions of other people influence the way in which one responds to them and subsequently how people respond. Douglas McGregor’s Theory X and Y illustrates how the perceptions managers have of their employees influence the way they treat their employees and, in turn influence their employees’ performance. Managers who perceive their employees as resourceful (theory Y) create opportunities for them to demonstrate their potential and achieve success. The opposite is also true. Managers who perceive their employees in a negative light (theory X) treat them in a derogatory way, which subsequently reflects in the poor performance of the employees (Bagraim, et al. 2007:52).

Bagraim, et al. place emphasis on diversity in the workplace which challenges managers to perceive people as unique individuals and to steer away from stereotyping and other perceptual errors that could incapacitate people. Faulty perceptions during the employment and performance management process can cause major harm not only
to the organization but also to the individual. Training can improve a manager's awareness of existing perceptual errors, and help him or her to focus on relevant job-related information rather than on personal differences irrelevant to the situation.

2.3. PERFORMANCE APPRAISAL AND PERFORMANCE MANAGEMENT

Performance Appraisal is a process of systematically evaluating performance and providing feedback on which performance adjustments can be made. Grobler (2000:260) defines Performance Appraisal as “an on-going process of evaluating and managing both the behavior and outcomes in the workplace”. Byers and Rue (1994:288) define Performance Appraisal as a process that involves determining and communicating to an employee how he or she is performing on the job and, ideally, establishing a plan of improvement”. Properly conducted Performance Appraisals not only indicate the level of employee performance but influence future level of effort and task direction. Organisations use various terms to describe this process and some of the terms used include: performance reviews; annual appraisal; performance evaluation; employee evaluation; and merit evaluation.

The White Paper on Human Resource Management in the Public Service (1997) highlights the importance of performance management in the Public Sector and states that “the success of the Public Service in delivering its operational and developmental goals depends primarily on the efficiency and effectiveness with which employees carry out their duties”.

Performance management is the day to-day management of employees in terms of the goals of the organization. A performance management system according to Bagraim(2007:105-106) is a systematic process that formally documents the goals and objectives of each employee, with a built in review process. Good performance management means that each person will have goals and measures that are linked directly to the organisation’s strategy.
Managing performance is therefore a key Human Resource Management tool to ensure that:

- Employees know what is expected of them;
- managers know whether the employee’s performance is delivering the required objectives;
- poor performance is identified and improved; and
- good performance is recognized and rewarded.

The Paper further suggests the following principles to be applied in the implementation of the performance management system in the Public Sector:

- Results orientation;
- training and development;
- rewarding good performance;
- managing poor performance; and
- openness, fairness and objectivity.

Performance Management is, thus, an integral part of an effective Human Resource Management and Development strategy. It is an on-going process, in which the employee and employer, together, strive constantly to improve the employee’s productivity and his/her contribution to the organisation’s wider objective.

Performance management in its current context within the South African Public Service has been informed by the evolution of human resource management since 1994. Gone are the days when human resource management was viewed as a means of indoctrinating current and prospective public servants to conform to the ideals of an oppressive Apartheid employer. Instead the focus has been placed on how the Public Service can enhance its performance to the benefit of the citizens.

The South African government realized early that if it was to transform the way the Public Service operates, it needed to transform the manner in which it manages its employees. It introduces policy frameworks that focused on transforming the Public
Service into an agency that is coherent and representative, as well as capable of achieving the crucial goals set for it by the people and government of South Africa. Such an approach places people at its center. Through effective performance management the belief was that the attitudes of public servants would be directed in such a manner that the priorities of government, and of the community or the people that it serves, would be enhanced through improved individual performance.

The overall objective with performance management as contained in the Public Service Regulations (1999, South Africa) are supported by Armstrong (cited by Ramsingh, 2007) who indicates that from both private and public sector perspective the objectives can be defined as follows:

- To align organizational and individual goals.
- To foster organization wide commitment to a performance-oriented culture.
- To develop and manage the human resources needed to achieve organizational results.
- To identify and address performance inefficiencies.
- To create a culture of accountability and a focus on customer service.
- To link rewards to performance.

The application of performance management systems, which apply to two categories of staff namely senior managers and staff below the senior management service (SMS), provide a sound basis for the objective measurement of performance. Performance measures are discussed and agreed to upfront and developmental plans are put in place. Through the review of performance, feedback is provided on a regular basis and employees are made aware of the areas they should improve on.

The training facilitated through the development plans of individuals contributes further to improved performance as a result of gained competencies, knowledge and skills.

To this end the South African performance management system has the following underlying principles:
It provides the basis for improving the performance of the Public Service as a collective.
It establishes a performance and learning culture.
It helps clarify responsibilities, priorities and expectations of employees.
It encourages communication between supervisors and subordinates.
It provides a mechanism for promoting accountability.
It provides performance incentives and therefore the basis to reward good performance.
It provides the basis to deal with poor performers.

These principles as a collective seek to enhance public service performance, retain good performers and improve the performance of the Public Service and its ability to effectively deliver services as a whole.

2.4. THE DEVELOPMENT APPRAISAL SYSTEM (DAS)

The Development Appraisal System (DAS) forms Chapter C of the terms and Conditions of Employment of Educators determined in terms of Section 4 of the Employment of Educators Act (76 of 1998). This policy is also Resolution 4/1998 of the ELRC. The aim of DAS is to facilitate the personal and professional development of educators in order to improve the quality of teaching practice and education management. It is based on the fundamental principle of Life-Long learning and development. This implies that one has to prioritize areas for development and growth throughout one’s career in Education. Performance appraisal is a process whereby performance is evaluated and feedback is generated in order to effect improvement in the organization as well as promoting individual development. DAS comprises two major activities: staff development and classroom observation. Its objectives are remediation and updating of teacher knowledge and techniques.
De Clercq (2008:11) states that appraisal is an essential ingredient of school development. It provides a framework to identify teacher’s strength and weaknesses and facilitates the identification of personal and professional development plans within the broader aim of school development. The developmental purpose assumes that teachers trust one another and want to improve their performance by reflecting together as professionals on their development needs (De Clercq, 2008:11). De Clercq also holds the view that it is a challenge to ask senior managers to act as evaluators and advisors at the same time. Combining appraisal for development and performance management with the common appraisal instrument sends ambivalent messages to school staff who can be tempted to use the instrument for the sole purpose of securing rewards.

Norms and Standards for Educators’ policy document (2000) formalizes the roles of managers in curriculum change and delivery, and outlines the competencies that they will have to acquire for effective curriculum development and delivery as well as performance management in schools. Such competencies include interpreting needs, researching educational practices and formulating interventions for learners. Harris and Lambert (2003:116) concur with the policy on Norms and Standards for educators, by stating that professional development is continuous learning focused on the central goal of making a difference on the lives of diverse students.

The purpose of DAS is to enhance the competency of educators, through professional development. According to van Deventer and Kruger (2003:21), the aim of development appraisal is to facilitate the personal and professional development of educators in order to improve the quality of teaching and learning. A high quality educator development programme is an important means of refreshing, updating and expanding an educator’s knowledge and skills. Performance appraisal and educator development inform and strengthen each other without duplication of structures and procedures. The responsibility of educator development rests with both the individual educator and the school. The school must develop policies that make provisions for resources that assist in staff development. This is done by the staff development team after analyzing every
educator’s personal growth plan. Blandford (1997:135) states that development cannot be imposed on an individual, the educator must own the development process. According to van Deventer and Kruger (2003: 211), the developmental appraisal system must take into account the following guiding principles:

- The process of appraisal should be open, transparent and developmental.
- The appraisal of educators is in essence a developmental process which depends upon continuous support. It is designed and intended to entrench strengths, develop potential and overcome weaknesses.
- The appraisal should be inclusive of all stakeholders and its members should be trained to conduct the process of appraisal.
- Educators should be informed of all aspects of the appraisal process, so that they can take the initiative to conduct the process of appraisal.
- Prompt feedback by way of discussions and written communication to those who are being appraised should be one of the indispensable elements of appraisal.
- The appraisee has the right to have access to and respond to the appraisal report.
- The instrument for the appraisal should have appropriate criteria to appraise the nature and level of the work performed.

DAS consist of the following major appraisals: self appraisal, peer appraisal, senior appraisal and external appraisal.

2.4.1. Self appraisal

The educators undertake a self analysis of their own work. They are responsible for determining their own strengths and weaknesses. It helps educators to focus on areas of need and identifies areas of their expertise to assist colleagues (Government Gazette, 1998).

2.4.2. Peer appraisal
This is the involvement of a colleague in assisting an appraisee to review his/her performance with the intention to prioritize professional development needs. The observation of an educator in practice is the process through which a colleague on the appraisal panel will visit the workstation of the appraisee for the sole purpose of observing methods used by the educator and provide the necessary support (Government Gazette, 1998). The appraisal done by a peer involves educators evaluating each other and working together to assist in the areas where problems have been identified. This could take the form of educators seeking assistance from other educators in the same grade/school or from other institutions like the universities and the education department.

2.4.3. **Senior appraisal**

Senior appraisal is done by first identifying an educator’s immediate senior (supervisor or head of department) who is responsible for conducting his or her appraisal (Government Gazette, 1998). The supervisor is in the best position to observe the employee’s behaviour and determine whether the employee has reached the specific goals and objectives (Carrell et al, 2000).

2.4.4. **External appraisal**

External appraisals are done by people from outside the school which could be department officials for the purpose of whole school evaluation and educators from other schools in the case of a school not having a learning area specialist for an educator, to help with his or her development (Government Gazette, 1998). External appraisals could also be requested when a dispute that cannot be solved by the staff development team or the school’s management team arises.
2.5. WHOLE SCHOOL EVALUATIONS (WSE)

The policy on Whole School Evaluation is a notice in terms of Section 3(4)(1) of the National Education Policy Act, 1996 (Act 27 of 1996). This Policy is aimed at improving the overall quality of education in schools. It seeks to ensure that all learners are given an equal opportunity to make the best use of their capabilities. As a process, whole school evaluation is meant to be supportive and developmental rather than punitive and judgmental. This policy maintains that it will not be used as a coercive measure, though part of its responsibility will be to ensure that national and local policies are complied with. The policy also contains a built in mechanism for reporting findings and feedback to the school and to various stakeholders – the National and Provincial Education Departments, parents and society in general – on the level of performance achieved by schools. The 2001 Whole School Evaluation (WSE) strategy combines a form of internal and external evaluation to find out how schools are performing. The evaluation process stipulates that schools need to account for their performance by evaluating themselves annually, on the basis of nationally agreed evaluation criteria.

To ensure that appraisal is in line with key job functions, core criteria have been identified and defined for each level of educator. These criteria are uniform for all educators and do not take into consideration the variance in South African schools. Educators in more affluent schools which are better resourced will be advantaged compared to educators in rural schools which are under-resourced and under-staffed. The prescribed criteria which assumes a “one size fits all” approach is not feasible in South African schools given the huge disparities left by the apartheid regime.

De Clercq (2008:110), states that it is crucial to identify more suitable forms of accountability and support for South African schools so that they benefit and engage in a process of genuine school capacity building and improvement. De Clercq also states that the support system that the schools have is not enough. Districts need to revise the
essential nature of their support role and devise new strategies to ensure that schools have access to professional support. It is impossible to apply the same strategy on different schools because schools are different and the results might not be positive.

De Clercq (2008: 110) is of the view that the Department of Education needs to develop an independently managed national evaluation system to enable them to take stock and compare the performance of schooling evaluation. The Department must urgently revise, plan and invest resources in a more effective system of school support. Further, there needs to be reciprocal accountability between departments, districts and schools. District authority and capacity must be actively and urgently developed.

Van Niekerk (2003:184) writes that schools should empower themselves to do independent school based self evaluation to benefit maximally to self evaluation. He further suggests that schools that perform self evaluations yield good results and have a strategic advantage over those that react to the results of external evaluations by the Department of Basic Education. Van Niekerk (2003: 182) believes that setting and achieving according to one’s own standards of excellence makes for winning organization.

2.6. STRUCTURES INVOLVED IN THE IMPLEMENTATION OF IQMS

There are structures that facilitate the implementation of the IQMS in schools. These are the School Management Teams (SMT), the Staff Development Teams (SDT) and the Development Support Group (DSG).

2.6.1. The School Management Team

This team consists of the principal, deputy principal and the education specialist (head of department). Their main role is to ensure that the school is operating efficiently and effectively. The team has to assist with broad planning and implementation of IQMS
(ELRC, 2003:12). The SMT must obtain a satisfactory working knowledge of self evaluation to be able to guide the process and motivate staff and other role players.

The staff development team (SDT) and school management team (SMT) mutually support each other in all matters relating to the Integrated Quality Management System, and therefore share the same roles and responsibilities (ELRC, 2003).

The following are the roles and responsibilities of both the School Management Team and Staff development team:

- Ensure the training of all staff members in the procedures of the Integrated Quality Management System (IQMS).
- Develop and monitor the management plan for IQMS and the school improvement plan.
- Liaise with the Department of Basic Education and other relevant service providers in the respect of INSET, short courses and skills programmes.
- Monitor that all records and documents related to IQMS are maintained.
- Complete all documentation necessary for performance measurement and submit these documents including the School Improvement Plan to the district office.
- Resolve differences between appraisees and their Development Support Groups (DSG).
- Liaise with the external Whole School Evaluation (WSE) team to manage the cyclical external WSE process.

2.6.2. The Staff Development Team

The Staff Development Team consists of the principal, the Whole School Evaluation coordinator and democratically elected post level one educator. The SDT is responsible for the management of the process of IQMS. The Staff Development Team and the
School Management Team (SMT) are tasked with the responsibility for, *inter alia*, assuring fairness and accuracy of the Performance Measurement process of Developmental Appraisal; providing ongoing support; co-ordinating lesson observations; development of the School Improvement Plan (SIP) and ensuring the link between appraisal and Whole School Evaluation (ELRC, 2003: 21). It plans, oversees, coordinates and monitors all quality management processes.

Ntombela *et al*, (2010:367) write that the Staff Development Team agreed unanimously that the theory behind the IQMS policy was excellent as it demonstrates the determination by the Department of Basic Education (DoE) to progress and develop. He also writes that the team however noticed shortcomings in the policy when it comes to practical implementation.

### 2.6.3. The Development Support Group

The Development Support Group consists of an educator’s immediate senior and one other educator called the peer. The DSG is responsible for baseline evaluation of educators for developmental purposes and the summative evaluation at the end of the year. The main purpose of the development support group is providing mentoring and support to the educator (ELRC, 2003). The DSG has to include the educators’ immediate senior (Head of Department) and one other educator (peer) – selected by the educator- and who has the phase/Learning Area/Subject expertise and “is able to provide the necessary guidance and support” (ELRC, 2003: 22). The DSG is designed to assist the educator to set his/her targets and time-frames for improvement in a personal growth plan (Muller, 2004:6). One wonders about the extent to which the DSG is seen as a place where educators can reflect on their own weaknesses and honestly identify problem areas requiring improvement when the members of the DSG are also responsible for the educators’ promotion, pay issues and performance evaluations. This is particularly problematic when one considers that the DSG is responsible for the end of year summative evaluation for performance measurement purposes.
The development support group is responsible for the development of the educator’s personal growth plan (PGP) and for the baseline evaluation of the educator. The development support group works with the staff development team (SDT), to incorporate the educator’s plans for development into the School Improvement Plan (SIP). Finally, the development support group must verify the scores provided for the end of year performance measurement.

2.7. RECORDS AND DOCUMENTATION

The records and documentations that have an impact in the implementation of IQMS are discussed below.

2.7.1. Personal Growth Plan (PGP)

The PGP should be an outcome (or consequence) of the Strategic Plans of the relevant department of basic education and Developmental Appraisal (DA). The educator in consultation with members of the DSG develops it. It must be used to inform the School Improvement Plan (SIP) – which, in turn, will be submitted to the district office to inform their planning and deployment of support staff.

2.7.2. School Improvement Plan (SIP)

The School Improvement Plan enables the school to measure its own progress through a process of ongoing self-evaluation. This must happen continuously, especially in the years between the cyclical external WSE. The SIP is developed by the SMT and SDT (and is submitted to the District Manager) and enables the SMT and SDT to monitor progress and improvement. The SIP must be based and linked to the Strategic Plans of the relevant department of education. The PGPs of individual educators as well as the other seven Focus Areas included in the WSE policy, also, inform the SIP (ELRC, 2003).
2.7.3. District Improvement Plan

The District Improvement Plan enables the officials to plan, coordinate and monitor the delivery of support and development opportunities in the schools in their areas. The plan is informed by the Strategic Plan of the relevant department of education and the SIPs submitted by schools under its jurisdiction (ELRC, 2003).

2.8. CONCLUSION

The researcher in this chapter analysed IQMS by looking at the roles and responsibilities of all the structures that are involved in ensuring the development of teachers and the improvement of teaching and learning in schools. This review will elicit whether the process was followed and whether it made a difference to the educator's development.

Chapter 3 will deal with the Research Methodology.
CHAPTER 3: RESEARCH METHODOLOGY

3.1. INTRODUCTION

This chapter outlines the research methodology used in this study. It focuses on the research design, the data collection, sampling, how data will be analysed, ethical issues and the reliability of the instruments.

3.2. RESEARCH DESIGN

A research design is a plan or strategy which moves from the underlying philosophical assumptions to specifying the selection of respondents, data gathering techniques to be used and the data analysis to be done. A research design refers to one’s overall research approach and justification of the use of that approach with regards to the problem under investigation (Imenda & Muyangwa, 2000:13). Mouton (1996:107) defines a research design as a set of guidelines and instructions to be followed in addressing the research problem. He writes that the main function is to enable the researcher to anticipate what the appropriate research decisions should be so as to maximize the validity of the eventual results. Mouton (2003:55) further defines research design as a plan or a blue print of how one intends conducting a research.

The research study used both quantitative and qualitative strategies to get to probe the educators’ perception on the implementation of the IQMS. Mixed methods research is formally defined as the class of research where the researcher mixes or combines quantitative and qualitative research techniques, methods approaches or concepts into a single study. It is an attempt to legitimate the use of multiple approaches in answering research questions rather than restricting the researcher’s choices. Tashakkori (2003:189) is of the same view that specific research methods enable researchers to describe, understand and explain the complexity of living by providing various perspectives, while different methods are best designed for and used to answer
particular types of questions. Combining and increasing the number of research strategies enables one to broaden the dimension and thus the scope of the project. Tashakkori emphasizes that in using more than one method within a research project, the researcher is able to obtain a more complete picture of human behavior and experience. Thus the researcher is better able to hasten the understanding and achieve the research goals more quickly.

Sharon (2002:27) writes that the use of multiple methods of collecting data can be seen as a strategy for obtaining consistent and dependable data as well as data that is most congruent with reality as understood by the participant. Qualitative research on the other hand, is concerned with collecting and analyzing information in as many forms, chiefly non-numeric, as possible. It tends to focus on exploring, in as much detail as possible, smaller numbers of instances or examples which are seen as being interesting or illuminating, and aims to achieve depth rather than breadth (Loraine et al. 2006:64).

3.3. QUALITATIVE RESEARCH

Qualitative research is based on a naturalistic approach that seeks to understand phenomena in context and in general, the researcher does not attempt to manipulate the phenomena of interest (Maree, 2008: 78). Research is carried out in real-life situations not in an experimental situation. Denzin & Lincoln (2003: 13) define the word qualitative as an emphasis on the qualities of entities and on processes and meanings that are not experimentally examined or measured in terms of quantity, amount, intensity, or frequency. Qualitative researchers stress the socially constructed nature of reality, the intimate relationship between the researcher and what is studied, and the situational constraints that shape the inquiry. They seek answers to questions that stress how social experience is created and given meaning. Adam, (2007:26) writes that, qualitative research uses a number of methodological approaches based on diverse theoretical principles.
3.4. QUANTITATIVE RESEARCH

Quantitative studies emphasize the measurement and analysis of causal relationships between variables, not processes (Denzin, 2003: 13). Maree, (2008: 145) defines quantitative research as a process that is systematic and objective in its ways of using numerical data from only a selected subgroup of a universe to generalize the findings to the universe that is being studied. Adams, (2007: 26) writes that quantitative research is based on the methodological principles of positivism and neo-positivism, and adheres to the standards of a strict research design developed prior to the actual research. It is applied for quantitative measurement and thus statistical analysis is used.

3.5. DATA COLLECTION

The choice of data collection that was used, is interviews and questionnaires since both qualitative and quantitative research strategies were used. A letter was written to the District Head Office to get permission to conduct a research in schools and was signed by the researcher’s supervisor. Principals were given a letter to request permission to conduct research in the school. The principals were contacted personally to arrange the dates that will be suitable to them for the research.

3.5.1. INTERVIEWS

An interview is a conversation between people in which one person has the role of researcher (Gray, 2005:213). Interview is a highly subjective technique and there is always the danger of bias, but it can yield rich material and can often put flesh on the bones of questionnaire responses. The data was collected using semi-structured interview method because it is flexible and allows in-depth discussions with the participant. The semi-structured interview allowed for probing of views and opinions where it was desirable for respondents to expand on their answers. Such probing also allowed for the diversion of the interview into new pathways which, while not originally
considered as part of the interview, helped towards meeting the research objectives. One of the key aspects of an interview is that it allows the researcher to explain the questions in a manner that can be understood by the educator. It also incorporates socio related issues which have an impact on the IQMS and allows the formulation of questions at the spur of the moment. The researcher drew up an interview schedule to guide the discussions during the process, and also assisted in posing similar questions to the respondents, but these questions were used by the researcher as key areas that needed probing.

During the interview the researcher used a note pad and a recorder to capture every detail of the response. The note pad was used to write down physical expressions observed shown by the respondent as it was impossible to write everything down. A recorder was used because there was no time to write down the responses and the researcher had the opportunity to rewind the whole conversation. Permission for the use of the tape recorder was asked beforehand as it involves ethical issues. The researcher’s questions did not lead the respondent towards specific or predetermined conclusion but rather led them to clarify and elaborate. Each participant was requested to sign a Letter of Informed Consent. This form outlined the study, risks, benefits and the extent of confidentiality of the interview. Educators were verbally informed about the nature and consequence of the research. They were also notified to participate voluntarily without any physical or psychological coercion and that they had the right to withdraw at any time during the interview process.

3.5.2. QUESTIONNAIRES

Gray (2005:187) defines questionnaires as research tools through which people are asked to respond to the same set of questions in a predetermined order. He writes that they should be used carefully when they fit the objectives of the research. A list of recorded questions will be supplied to the respondents to complete in writing, which will later be used in conjunction with the interview responses to extract the analysis of the
collected data. This approach also ensures that certain sensitive questions which the educators would be more comfortable to write as compared to share in interaction through the interview process (Kumar, 2005:130) will be addressed. The aim of the questionnaire was to evaluate the impact of IQMS in schools in the Mdantsane area. There were four set of questions in each questionnaire which was sub divided into sub-questions. The questions were mostly closed with few open ended so as to put the respondents at ease and to be able to express themselves in their own words and give them a sense of control.

Questionnaires have the disadvantage of not allowing the researcher to interact, or often even to observe respondents, hence it was mixed with interviews. The questionnaires are limited in the depth to which the researcher is able to probe any particular respondent and do not allow for digression from the set format. Hofstee (2009:133) writes that questionnaires can offer confidentiality to respondents, and are generally easier to analyse and turn into quantitative results. The questionnaires were distributed to 9 schools in the Mdantsane area and the schools were given enough time to fill the questionnaires. They were collected after three days.

3.6. SAMPLING TECHNIQUE

Sapsford (2006:26) defines a sample as a set of elements selected in some way from a population. He writes that the aim of sampling is not only to save time and effort, but also to obtain consistent and unbiased estimates of the population status in terms of whatever is being researched. Adams, (2007: 87) defines sampling as the process or technique of selecting a suitable sample for the purpose of determining parameters or characteristics of the whole population. The sampling strategy that was used in this study was the stratified random sampling. The choice of using this method was to use participants in the three categories in schools primary, junior and secondary schools.
The schools that were studied were selected randomly in the Mdantsane area from 3 different categories, primary schools, junior schools and secondary schools. The 5 teachers from each school were randomly selected. To draw a stratified random sample, the elements of a population were divided into non-overlapping groups – strata. Simple random samples were drawn from each of these, and together they formed the total sample. Sampling is generally viewed as a process of selecting one or more cases for investigation for the purpose of generalizing to a larger universe of such cases. One selects a few individuals, or organizations in order to say something about a larger class of similar individuals or organizations (Brewer and Hunter, 1990:122).

3.7. DATA ANALYSIS

The purpose of analysis is to reduce data to an intelligible and interpretable form so that the relations of research problems can be studied, tested and conclusions drawn.

The sampling of data will be 5 educators per school which is relatively small and therefore manual analysis will be applied. Content analysis will be used to analyse data. Content analysis is defined by Maree, (2008:101) as a systematic approach to qualitative data analysis that identifies and summarises message content. Content analysis is used to analyse qualitative responses to open-ended questions on surveys, interviews or focus groups. Maree, (2008: 101) writes that content analysis is a process of looking at data from different angles with a view to identifying keys in the text that will help to understand and interpret the raw data. The data collected by questionnaires may be either qualitative or quantitative. Questionnaires do, however, lend themselves more to quantitative forms of analysis. This is partly because they are designed to collect mainly discrete items of information, either numbers or words which can be coded and represented as numbers (Blaxter, 2006 : 215).
3.8. ETHICAL CONSIDERATIONS

Research ethics are about how to acquire and disseminate trustworthy information in ways that cause no harm to those being studied (Rubin, 1995: 93). The central ethical issue surrounding data collection through interviews is that respondents should not be harmed or damaged in any way by the research (Gray, 2005:235). Gregory (2003: 35) writes of the two principles of ethics, principle of consent and principle of confidentiality. He believes that fully informed voluntary consent dominates all others. He cites that every code of ethics designed to guide research involving human subjects, gives primacy to the requirement of fully informed voluntary consent on the part of the individuals concerned. He is of the opinion that research involving human subjects undertaken without the explicit consent of the researched, lacks an adequate moral basis, and it would be better if the research were not undertaken. Gregory (2005: 49) explains that a researcher undertaking to ensure the confidentiality of their informants subsequently stands under an obligation to discharge that obligation.

Denzin and Lincoln (2003: 89) bases the ethical considerations on three principles, namely, informed consent, right to privacy and protection from harm. All these ethical principles underpin the study. If a respondent becomes anxious or upset during the course of an interview, the session should be immediately abandoned. The interviewee has the right not to answer individual questions or to terminate the interview before its completion. Respondents will be offered confidentiality when completing questionnaires.

3.9. RELIABILITY AND VALIDITY OF THE RESEARCH INSTRUMENTS

Adams, (2007: 235) writes that reliability estimates the consistency of the measurement or more simply, the degree to which an instrument measures the same way each time it is used under the same conditions, with the same subjects. It is about consistency. He writes that if something is measured many times and the result is always the same, then
one can say that the measurement instrument is reliable. Adams continues further saying an instrument can be reliable but does not necessarily mean is valid. It means that the measurement instrument does not produce erratic and unpredictable results. It may be measuring a variable wrongly all the time but as long as it measures it consistently wrongly, it will be considered reliable.

May, (2003: 154) cites that one of the most important factors determining the strength of a study to generalize has to do with whether the sample population is an accurate representation of other populations in society. This means that the first line of representation has to do with selecting a group of people that represents other populations that the researcher wants to say something about. Selecting a sample is necessary and the strategy employed in doing that will affect the degree of reliability in findings. May continues that if the sample is carefully chosen to match other sites, then one requirement affecting reliability has been satisfied. However if the sample has been chosen poorly, then reliability has been compromised and generalization is problematic.

Adams, (2007: 237) defines validity as the strength of conclusions, inferences or propositions. It involves the degree to which one is measuring what is supposed to, the accuracy of the measurement. Maree, (2008: 216) asserts that validity of an instrument refers to the extent to which it measures what it is supposed to measure. In human sciences this is problematic since instruments need to measure human emotions like anger and motivation. Maree discusses a number of different types of validity, face validity, content validity, construct validity and criterion validity.

Maree, (2008: 217) defines face validity as the extent to which an instrument looks valid. In other words, the instrument appears to measure what it is supposed to measure. He affirms that this type of validity cannot be quantified or tested, but should be scrutinized by experts in the field to ensure a high degree of face validity.
Content validity is the extent to which the instrument covers the complete content of the particular construct that it is set out to measure. To ensure the content validity of an instrument, the researcher usually presents a provisional version to experts in the field for their comments before finalizing the instrument (Maree, 2008: 217).

Construct validity is needed for standardization and has to do with how well the constructs covered by the instrument are measured by different groups of related items. If one wants to measure personality, there are a number of different personality factors that need to be measured, each by a different set of related items and they need to be addressed by a number of questions whose combined responses provide a measure of the factor (Maree, 2008: 217).

Criterion validity tests whether an instrument measures what it is supposed to measure. To be able to measure the degree of criterion validity of an instrument, scores on an existing instrument which is known to measure the same construct should be available for the sample of subjects. The correlation between the instrument and criterion is an indication of the criterion validity of the instrument. A high correlation indicates a high degree of validity and a low correlation indicates a low degree of validity (Maree, 2008:217).

3.10. CONCLUSION

This chapter discussed the research design, the research strategy that was used which is a mixed method. It outlined the instruments that were used for the collection of data and the ethical considerations that underpins the study. Sampling that was used in this study is stratified random sample.

Chapter four will deal with data presentation, analysis and interpretation.
CHAPTER 4: DATA PRESENTATION, ANALYSIS AND INTERPRETATION

4.1. INTRODUCTION

This chapter presents the raw data which were collected in schools from different school categories. The chapter deals with the analysis techniques used in the study and the research findings from the participants’ responses.

4.2. PRESENTATION OF DATA

Since the study used mixed methods in the research, interview results and questionnaire results will be presented and analysed.

4.3. INTERVIEW RESULTS

The questions that were posed to the respondents were guided by the interview schedule that was prepared to answer the research questions. Interviews were conducted with 5 teachers from the 9 schools that were randomly selected.

4.3.1. RESEARCH QUESTIONS

The research questions will now be dealt with.

4.3.1.1. Did implementation of IQMS improve teaching and learning?

To answer this question, the researcher asked the teachers ‘do you see the IQMS impacting on the culture of learning and teaching of school?’ 60% of the teachers from school categories Primary and Junior responded positively and were all in agreement that there is improvement in teaching and learning, while 40% of the teachers mostly
from secondary schools did not see any improvement with regards to learning though a slight change in teaching. Teachers acknowledged that they have incorporated the IQMS as a daily routine not as a separate thing. They highlighted that for the first time they were able to reflect on their teaching practice and were able to refine their teaching methods. All teachers interviewed concurred that there could be a drastic improvement in teaching and learning if the system could address some highlights every year to the district office. Some of those challenges are the support required by schools, feedback reports that will determine how they are performing and the monitoring by the district office.

From an analysis perspective, the district office does not play its role during the implementation of IQMS as the District Improvement Plan requires. The District Improvement Plan enables the officials to plan, coordinate and monitor the delivery of support and development opportunities in the schools in their area. This plan is informed by the Strategic Plan of the Department of Basic Education and should in turn inform the School Improvement Plans.

4.3.1.2. Do educators understand the IQMS, its content and objectives?

To answer this question, educators were asked if they were trained in the content of the IQMS. The response from all categories was that 52% of the teachers in primary and junior school were trained, 48% in secondary schools were trained. The teachers that were trained had to transfer the knowledge to those that were not trained. Teachers who have few years of service are the ones who did not receive any training. Another question was asked if they had the IQMS manuals. The response was that 53% had the manuals and 47% did not.

Based on the above results, there is a fair understanding of IQMS content and objectives. It is clear that schools do not have enough material that will guide them in implementing the IQMS and teachers had to organize themselves which leaves a big gap in school management. The schools did not get intensive training on the objectives and content of the IQMS hence the fair understanding.
4.3.1.3. **What are the educators’ attitudes towards IQMS document?**

55% of the respondents were happy with the document saying it is explicit, clear and easy to follow. 45% felt that the document needs to be reviewed. Without the district office involvement in the monitoring of IQMS, they will not know when to review the document and what changes should be effected.

From an analysis point of view, educators did not seem confident about the document and there was lack of buy-in from schools. It was clear that schools were not involved in the development of the document, it was imposed upon them.

4.3.1.4. **What are the educators’ attitudes towards the IQMS implementation?**

78% of teachers from Primary and Junior school were enthusiastic about IQMS, while 22% were inconclusive. One educator said if pay progression could be removed so that people work towards achieving goals instead of working to gain money that would direct the focus of the educators in the improving of teaching. They felt that to some of them IQMS is a good tool that if everyone could use it, life in schools could improve. Secondary teachers showed no interest, they felt that as much as it is a good tool there is little time that they can allocate to it. They claimed that too much paper work restricts the amount of time they have to spend in the classroom. Teachers claimed that there is no support and monitoring given by the district office which makes them not know how they are doing as the school. Some secondary school teachers confirmed that they are only doing IQMS to comply. Teachers agreed that, if there could be more training and monitoring by the district office there could be an improvement.

It can be deduced that based on the above results, there is lack of coordination in the structures of IQMS especially in secondary schools. Monitoring and support is lacking from school management teams. There is lack of good governance and no accountability in all the structures.
4.4. QUESTIONNAIRE RESULTS

Questionnaire results will now be explained.

4.4.1 BACKGROUND

This study was carried out with the main objective of establishing the opinions of respondents on the different aspects of the IQMS policy. Of interest were the opinions of the school based educators on the policy document and its implementation. The study was designed to determine the educators’ level of understanding of the content of the IQMS policy document and its accessibility and implementation. Also of interest was to determine if they received any training on the document and if they did, whether they found the training adequate. The data was collected using a questionnaire containing both closed and open-ended questions. The questionnaire was divided into three sections, namely, section A with questions on biographical characteristics of the respondents, section B with items on the opinions of the respondents about the policy understanding and implementation and section C addressing issues of training and accessibility of the policy document. The items in section B were measured on a 5-point Likert scale going from Strongly Disagree (1) to Strongly Agree (5) while section C items were measured on a binary scale of yes (1) or no (2) responses.

The biographical characteristics of interest were the category of school (primary, junior and secondary), gender, experience, position and membership to some development and/or support group. These were recorded in the hope that the responses to the questionnaire depend on these characteristics.

4.4.2 STATISTICAL METHODS
The sample description was given using frequency tables and/or bar charts. The initial step in the analysis was to reduce the number of variables by deriving some constructs from the questionnaire items. This was done using factor analysis backed up by a reliability analysis to determine the internal consistency of the items represented in each construct. The Cronbach’s alpha coefficient greater than 0.7 criterion was used to consider a given construct as adequately representative of the items it contains. Where the reliability coefficient is less than 0.7, the items were considered as stand-alone variables. The identified constructs were derived as arithmetic means of the items that make them up. The means and standard errors of means were used as descriptive summary statistics for the derived constructs and frequency distribution tables and percentages were used for the stand-alone variables. To test for the significance of the effects of biographical characteristics on the derived constructs, the t-test and one way ANOVA as well as their nonparametric counterparts were used. All tests for statistical significance were carried at a 5% level of significance.

4.4.3 SAMPLE DESCRIPTION

The sample was made up of 61 respondents. These were classified by category of the school, gender, experience, position and group membership. The distribution of the respondents by these biographical characteristics are given as bar charts below. These show that most of the respondents were educators (82%) and the majority had at least 10 years working experience (87%). The bar chart for gender shows clear bias towards female respondents with a 73.3% representation in the sample. All respondents belong to at least one development support group with 55.4% of them being members to exactly one group and 14.3% having membership to more than two groups. Half of the respondents were from a secondary school and 33.3% were from a primary school and the rest from the junior school category.
Figure 4.1

Distribution of respondents by category of school

<table>
<thead>
<tr>
<th>School category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary</td>
<td>33.3%</td>
</tr>
<tr>
<td>Junior</td>
<td>16.7%</td>
</tr>
<tr>
<td>Secondary</td>
<td>50%</td>
</tr>
</tbody>
</table>

Figure 4.2

Distribution of respondents by gender

<table>
<thead>
<tr>
<th>Gender</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>73.3%</td>
</tr>
<tr>
<td>Male</td>
<td>26.7%</td>
</tr>
</tbody>
</table>
Figure 4.3

Distribution of respondents by experience

<table>
<thead>
<tr>
<th>Experience</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-3 yrs</td>
<td>3.3%</td>
</tr>
<tr>
<td>4-6 yrs</td>
<td>5.0%</td>
</tr>
<tr>
<td>7-10 yrs</td>
<td>5.0%</td>
</tr>
<tr>
<td>Over 10 yrs</td>
<td>86.7%</td>
</tr>
</tbody>
</table>

Figure 4.4

Distribution of respondents by position

<table>
<thead>
<tr>
<th>Position</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principal</td>
<td>6.7%</td>
</tr>
<tr>
<td>Deputy Principal</td>
<td>17%</td>
</tr>
<tr>
<td>HOD</td>
<td>9.0%</td>
</tr>
<tr>
<td>Educator</td>
<td>81.7%</td>
</tr>
</tbody>
</table>
These distributions show that the samples were biased with respect to gender, position and experience. They clearly show that there were far more females, more educators than any other position and far more with at least 10 years experience than any other experience level. With this in mind, it would be unreasonable to compare the respondents with respect to these variables since the bias is already clear.

4.4.4 RELIABILITY ANALYSIS

The questionnaire had 12 items addressing the policy document, interpretation and implementation aspects measured on a 5-point Likert scale and 8 items addressing mostly personal experiences of educators with the evaluation system on a binary scale. Variable cluster analysis was used to identify possible item groupings. This analysis identified four item groups. The Cronbach’s alpha coefficient of reliability was then used to determine if the items groups were genuinely measuring the same aspect. Cronbach’s alpha coefficients greater than 0.7 are normally considered adequately large to justify collapsing the items into a single variable, known as an underlying construct. The results of this analysis are shown in the table below.
<table>
<thead>
<tr>
<th>Construct</th>
<th>No of items</th>
<th>Items</th>
<th>Cronbach’s α</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy understanding</td>
<td>5</td>
<td>B1-B5</td>
<td>0.83</td>
</tr>
<tr>
<td>Policy implementation</td>
<td>7</td>
<td>B6-B12</td>
<td>0.78</td>
</tr>
<tr>
<td>Policy training</td>
<td>4</td>
<td>C1 C2 C7 C8</td>
<td>0.77</td>
</tr>
<tr>
<td>Policy accessibility</td>
<td>2</td>
<td>C4 C5</td>
<td>0.73</td>
</tr>
</tbody>
</table>

The cluster analysis identified four item groupings as shown in the above table. It should be noted that the reliability coefficients for the identified groupings are all greater than the 0.70 level. Based on these groupings new variables, labeled constructs above, were derived as averages of the items within a given item grouping. The items C3 and C6 came out as stand alone variables with no correlation with the other items. The analysis that follows uses the four constructs derived above and the two stand alone variables.

### 4.4.5 DESCRIPTIVE STATISTICS

The derived constructs were summarized using means and standard errors besides the other statistics shown in the table below. The results show that, on average, the educators’ opinions on their understanding of the policy document and its implementation were slightly above average. Their mean policy understanding was 3.5 and the minimum and maximum values for this construct were 1.8 and 4.6 respectively. Similarly their mean policy implementation score was 3.4 with minimum and maximum values of 1.7 and 4.7, respectively. It should be noted that these means are just higher than the Likert scale neutral value of 3.

Their opinions on training and accessibility of the policy were below average with means of 1.3 and 1.2 respectively. The fact that these means are below 1.5 for the binary variables suggests that there were more respondents who received training and had access to the policy than those who did not.
Table 4.2: Descriptive statistics of derived constructs

<table>
<thead>
<tr>
<th>Variable</th>
<th>N</th>
<th>Range</th>
<th>Minimum</th>
<th>Maximum</th>
<th>Mean</th>
<th>Std. Error</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy understanding</td>
<td>59</td>
<td>2.80</td>
<td>1.80</td>
<td>4.60</td>
<td>3.52</td>
<td>0.09</td>
</tr>
<tr>
<td>Policy implementation</td>
<td>59</td>
<td>2.95</td>
<td>1.71</td>
<td>4.67</td>
<td>3.44</td>
<td>0.08</td>
</tr>
<tr>
<td>Policy training</td>
<td>58</td>
<td>1.00</td>
<td>1.00</td>
<td>2.00</td>
<td>1.31</td>
<td>0.05</td>
</tr>
<tr>
<td>Policy accessibility</td>
<td>58</td>
<td>1.00</td>
<td>1.00</td>
<td>2.00</td>
<td>1.22</td>
<td>0.05</td>
</tr>
</tbody>
</table>

The descriptive analysis of the stand alone variables representing training adequacy and satisfaction with policy implementation is presented in the form of frequency tables below.

Table 4.3: Training adequacy

<table>
<thead>
<tr>
<th></th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid</td>
<td>Yes</td>
<td>21</td>
<td>35</td>
<td>37.5</td>
</tr>
<tr>
<td></td>
<td>No</td>
<td>35</td>
<td>58.3</td>
<td>62.5</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>56</td>
<td>93.3</td>
<td>100</td>
</tr>
<tr>
<td>Missing</td>
<td>System</td>
<td>4</td>
<td>6.7</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>60</td>
<td>100</td>
<td></td>
</tr>
</tbody>
</table>

The valid percentages in the above table clearly suggest that the majority of the respondents felt that the training they received was inadequate. Only 37.5% of them felt that the training was adequate leaving 62.5% expressing dissatisfaction with the adequacy of the training. While the educators may not have been satisfied with the adequacy of the training they received, they seem to be divided over their satisfaction with the implementation of the policy. The table below shows that 52.6% expressed satisfaction with the policy implementation while the rest (47.4%) were not satisfied.
Table 4.4:  Satisfaction with policy implementation

<table>
<thead>
<tr>
<th></th>
<th>Frequency</th>
<th>Percent</th>
<th>Valid Percent</th>
<th>Cumulative Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valid</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>30</td>
<td>50</td>
<td>52.6</td>
<td>52.6</td>
</tr>
<tr>
<td>No</td>
<td>27</td>
<td>45</td>
<td>47.4</td>
<td>100</td>
</tr>
<tr>
<td>Total</td>
<td>57</td>
<td>95</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>Missing</td>
<td>System</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>60</td>
<td>100</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

These results suggest that the educators did receive training on the policy but this was inadequate as reflected by the high percentage in the training adequacy table above. This high percentage is a reflection of the mean policy training construct of 1.3 and the policy accessibility construct of 1.2. These means are lower than the expected average of 1.5 for these two constructs.

4.4.6 TESTS FOR SIGNIFICANCE

The opinions of respondents could differ with respect to some of their biographical characteristics. Tests for the significance of the effects of the biographical characteristics on the opinions on policy understanding, implementation, training and accessibility were carried and the results are presented by biographical characteristic below. These tests were carried out at a 5% level of significance, that is, any characteristic whose p-value is above 5% (0.05) does not affect the opinions of the respondents.

4.4.6.1 Gender effect

The significance testing results opinions on policy implementation significantly depended on gender (t=2.15, p=0.036). The gender effect is such that female educators
showed more satisfaction with the implementation of the policy than their male counterparts. This is reflected in the mean policy implementation score of 3.5 for female educators, compared to 3.1 for males. Otherwise there were no significant gender effects on the policy understanding, training and accessibility. This means male and female educators have the same opinions on these constructs. Although the means seem to suggest some differences, those differences were not statistically significant. However, female educators have a significantly higher understanding of the policy than their male counterparts, at a 10% level of significance.

Table 4.5: Gender Effect

<table>
<thead>
<tr>
<th>Construct</th>
<th>GENDER</th>
<th>N</th>
<th>Mean</th>
<th>Std. Error</th>
<th>t statistic</th>
<th>p-value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy understanding</td>
<td>Female</td>
<td>44</td>
<td>3.6</td>
<td>0.090</td>
<td>1.850</td>
<td>0.070</td>
</tr>
<tr>
<td></td>
<td>Male</td>
<td>15</td>
<td>3.2</td>
<td>0.196</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Policy implementation</td>
<td>Female</td>
<td>44</td>
<td>3.5</td>
<td>0.096</td>
<td>2.150</td>
<td>0.036</td>
</tr>
<tr>
<td></td>
<td>Male</td>
<td>15</td>
<td>3.1</td>
<td>0.136</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Policy training</td>
<td>Female</td>
<td>44</td>
<td>1.3</td>
<td>0.052</td>
<td>-0.850</td>
<td>0.415</td>
</tr>
<tr>
<td></td>
<td>Male</td>
<td>14</td>
<td>1.4</td>
<td>0.110</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Policy accessibility</td>
<td>Female</td>
<td>44</td>
<td>1.2</td>
<td>0.054</td>
<td>-1.110</td>
<td>0.271</td>
</tr>
<tr>
<td></td>
<td>Male</td>
<td>14</td>
<td>1.3</td>
<td>0.113</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**4.4.6.2 Group membership effects**

For group membership, the variable was defined as one group or more than one group. The results show that policy understanding depends on whether one is a member of just one group or several (t=-2.15, p=0.036). The ones who belong to more than one group were found to have significantly higher understanding of the policy than those with a single group membership. At a 10% significance level, those who belong to more than one group were more satisfied with the policy implementation (t=-1.91, p=0.062). This may be suggesting that those who belong to more than one support group had more opportunities of discussing the performance appraisal system at different group
meetings. As such, their understanding of the policy and its implementation would be higher than those with a single group membership. However, opinions on training and policy accessibility were the same regardless of group membership. The results for this analysis are shown in the table below.

<table>
<thead>
<tr>
<th>Table 4.6: Group membership Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>GROUP MEMBERSHIP</td>
</tr>
<tr>
<td>-------------------</td>
</tr>
<tr>
<td>Policy understanding</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Policy implementation</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Policy training</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Policy accessibility</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

4.4.6.3 Category effect

The opinions of the respondents on policy training were significantly dependent on the level of the respondent’s school. The table below shows the F values and their corresponding p-values. Note that the p-value for the policy training construct is 0.005, which is far less than the 5% significance level. The Tukey’s multiple comparison procedure was used and it grouped the respondents as primary and junior in the same group with means of 1.1 and 1.3, respectively and secondary in its own group with a mean of 1.5. This suggests that more of the educators in secondary schools did not receive training while some of the lower level schools did.
Table 4.7: Category Effect

<table>
<thead>
<tr>
<th>Construct</th>
<th>Anova F</th>
<th>p-value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy understanding</td>
<td>0.445</td>
<td>0.516</td>
</tr>
<tr>
<td>Policy implementation</td>
<td>0.305</td>
<td>0.641</td>
</tr>
<tr>
<td>Policy training</td>
<td>5.887</td>
<td>0.005</td>
</tr>
<tr>
<td>Policy accessibility</td>
<td>0.364</td>
<td>0.431</td>
</tr>
</tbody>
</table>

4.4.6.4 Experience and position effects

For these two variables it was not possible to make any reasonable comparisons due to the sampling bias mentioned earlier where 87% of the respondents have at least 10 years experience and 82% of the respondents were educators. As such no tests for significance were carried out for these constructs.

4.5. CONCLUSION

Interview results showed that there is an impact in the culture of teaching and learning in schools especially in the primary and junior school categories. It became imperative that more training on the IQMS policy is still needed.

Questionnaire results have shown that the educators have reasonable understanding of the policy and its implementation as reflected by means, 3.4 and 3.5 respectively. These means are between the neutral and agreement levels of the Likert scale. As such, educators generally have an above average understanding of the performance appraisal policy and its implementation. Means for the policy training and accessibility are 1.3 and 1.2 respectively, between yes and no but both closer to yes. This means the educators generally received training and find it accessible. It has also been found that female educators expressed better understanding of the policy than their male counterparts and that those with membership to more than one professional support group expressed more satisfaction with the policy implementation.
Chapter 5 will discuss the findings, conclusions and recommendations.
5.1. INTRODUCTION

In chapter four the researcher analysed the collected data and interpreted the findings. The purpose of this chapter is to discuss findings, conclusions and recommendations. The main purpose of the study was to evaluate the impact of Integrated Quality Management System in schools in the Mdantsane area. To achieve this purpose the study concentrated on the following research questions:

- Did implementation of IQMS improve teaching and learning?
- Do educators understand the IQMS, its content and objectives?
- What are the educators’ attitudes towards IQMS document?
- What are the educators’ attitudes towards the IQMS implementation?

The aim of the study was achieved through the collection of data in primary, junior and secondary schools. The path that was followed in this study was firstly, through literature study which was conducted for the purpose of getting more information on the roles and responsibilities of the structures of the Integrated Quality Management System and how the system should be implemented. The second path is through research methods, where interview and questionnaire instruments were used to get to probe the educators’ perceptions on the implementation of IQMS.

Chapter four presented the analysis of the data which was collected using interview and questionnaire instruments with regard to the impact of IQMS in schools.
5.2. MAIN FINDINGS OF THE INVESTIGATIONS

- On policy understanding, the study observed that there is a reasonable understanding of the policy which is impeded by lack of interest shown by educators in secondary schools. This is caused by lack of support from the structures in schools and lack of feedback from the district offices. Respondents from secondary schools agreed that there are no strategies to assist them in their developments as individuals and as teams. All respondents agreed that there should be workshops conducted every year for all the educators so as to increase their knowledge and understanding of the policy.

- Policy implementation is a challenge as not all educators are well informed and effectively trained on the policy. Some educators are not confident on whether what they are implementing is correct or not. This has been observed during one on one interviews. Educators blame it on the fact that they do not have policy manuals and there are no workshops that would assist them.

- It has been observed that IQMS was not correctly introduced to the educators so there was lack of buy in by all parties involved in education. As such there is resistance amongst educators who fill that they were never involved in the development.

- Educators who joined later after the introduction of the IQMS were never trained or attended any workshops, this also had a negative impact on those educators because it meant they needed to grasp the information as they were implementing. This fact demoralized educators especially the secondary school teachers as they claim that they have their hands full, it is difficult to concentrate in the classroom work and then monitor the peers and at the same time complete the paperwork.

- It was observed that there is lack of monitoring by district officials.
• Educators who are more involved in the IQMS structures have better understanding of the policy than the ones that are not involved. It has been observed that some educators do not belong to any structure. It is not clear how this is possible as it is expected that all educators should be involved in any of the structures.

• Availability of time was also an inhibiting factor in the implementation of IQMS. The administrative demands such as the filling of forms and record keeping reduced the time for teaching and learning. The problem was also experienced where educators served on more than one development support groups as they find it difficult to cope with the demands of the appraisal process.

• Another major concern with IQMS was the infrequency of appraisal. Schools make the IQMS to be a once off event rather than a process that takes the whole year.

• While most of the educators were receptive to the notion of professional development, they felt that IQMS was not fulfilling this purpose adequately. There were no follow up on developmental needs of educators by the district office.

5.3. CONCLUSION

• The purpose of the study was to evaluate the impact of IQMS in schools in the Mdantsane area. It has been observed through probing questions that not all teachers are excited about IQMS especially the implementation part. Secondary school teachers lack interest due to the failure of their support groups and the officials in the department. Some teachers only comply because they will be getting a 1% pay progression.

• There is no monitoring on the implementation of IQMS by the Department of Basic Education.
• One of the objectives of the IQMS was to ensure accountability and transparency in schools, but this is still a challenge as some educators do not know how they obtain their scores.

• Another objective was to allow teachers to play a vital role in assessing their own progress, and would integrate this with the necessary evaluation strategy for the professional development of educators and monitoring of the quality of teaching and learning in schools. Some educators feel there is still a lot that needs to be done so as to improve their teaching and learning in the classroom.

• There is still lack of good governance in the Department of Basic Education. Good governance has 8 major characteristics. It is participatory, consensus oriented, accountable, transparent, responsive, effective and efficient, equitable and inclusive and follows the rule of law. It is acknowledged that good governance is an ideal which is difficult to achieve in its totality but the Department of Basic Education should work towards achieving it. Transparency in good governance means that information is freely available and directly accessible to those individuals that are affected by the decisions taken. It is apparent that there was no transparency with the development of IQMS and the information which is manuals is not directly accessible to educators that impede the service delivery.

5.4. RECOMMENDATIONS

• The researcher recommends that the Department of Basic Education should design strategies that would review the policy document so as to highlight shortcomings of the system and be able rectify those shortcomings. Educators should be involved in that process so as to be able to own the document. This will make them accountable and might even motivate them as they will be implementing their product. There should be constant review of IQMS in schools.
• It is also recommended that all educators should be trained in the policy document and policy implementation. It has been observed that there is poor policy implementation due to the fact that some educators were not trained, some lack interest because they feel there is too much paper work that they have to produce. Each school should have step by step guidelines of how the policy should be implemented. Every structure should know exactly what is their mandate and how it contributes in the implementation of the policy. Educators could have implementation forums where they could discuss about their challenges in implementing the policy and also discuss their achievements so that everyone could benefit in each other’s best practice.

• There should be strategies on how monitoring and evaluation should be managed from the Department of Basic Education Head Office to the District office and down to all the school structures. Some of the schools complained about lack of monitoring by District Office which leaves them without knowing how they are performing. Effective monitoring with feedback every after evaluation should be performed.

• In order for the system to work well there should be intense trainings conducted every year at least to ensure that educators understand the policies and are still on track. To ensure that the system is more effective the department through the district office should conduct effective monitoring and evaluation. Schools should be given feedback after every evaluation so as to be aware of their performance and be able to design school improvement plans that are based on their identified shortfalls.

• Schools need to align their strategies with those of the district improvement plans. There should be strategies in place that ensures accountability by all the parties involved, educators, SMT, SGB, principals and district managers.
• The quality of trainings should not be compromised, qualified facilitators should be used in training the educators. Trainings should be intense and cover specific topic per training, not incorporate everything in one training.

• District officials should provide necessary support to educators whilst also tracking the implementation process. Monitoring of the process should be strengthened.

• Time management should be addressed by either extending the evaluation cycle to 3 years rather than a year to give enough time for classroom observation.
BIBLIOGRAPHY


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ANNEXURE A
QUESTIONNAIRE
SECTION A

Personal information: Please answer the following information by putting an X on the box applicable to you.

1. What is your school category?
   - Primary
   - Junior
   - Secondary

2. What is your gender?
   - Female
   - Male

3. Number of years in teaching
   - 1 – 3
   - 3 – 6
   - 6 -10
   - 10 and above

4. What is your current post?
   - Principal
   - Deputy Principal
   - Head of Department
   - Educator

5. Do you belong to any Development Support Group?
   - None
   - One
   - Two
   - Three and more
SECTION B

Use the five-point scale ranging from “strongly disagree” to “strongly agree” to mark the box that best represents your level of agreement with each of the statements in the column labeled Factor with a cross (X).

PERFORMANCE MANAGEMENT SYSTEM ASPECTS

<table>
<thead>
<tr>
<th>No.</th>
<th>Factor</th>
<th>1=Strongly Disagree</th>
<th>2=Disagree</th>
<th>3=Neutral</th>
<th>4=Agree</th>
<th>5=Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>The IQMS plan has been widely communicated to all educators</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Educators understand the content of the system as a whole and various components within it</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Each educator understand his/her role within the system</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Educators understand how the IQMS integrates with other initiatives and plans already in place</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>A functional and coordinated IQMS team is established</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

IMPLEMENTATION ASPECTS

<table>
<thead>
<tr>
<th>No.</th>
<th>Factor</th>
<th>1=Strongly Disagree</th>
<th>2=Disagree</th>
<th>3=Neutral</th>
<th>4=Agree</th>
<th>5=Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>Management is committed to successful implementation of IQMS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>IQMS implementation is</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>the same across all schools</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Implementation is carried out in accordance with established policies and guidelines</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Amendments to IQMS are done in writing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>IQMS is assessing educator performance accurately</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>IQMS is an appropriate tool for salary increment based on an individual educator’s performance</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Since the implementation of the IQMS teaching and learning have been improved</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
SECTION C

This section will answer whether the educators understand the IQMS, its content and objectives.

CHOSE YES OR NO TO THE FOLLOWING QUESTIONS

1. Have you been trained on IQMS?  Y / N
2. Have IQMS contributed to your personal and professional growth?  Y / N
3. Was the training received on the procedures of IQMS sufficient?  Y / N
4. Were you provided with a copy of IQMS?  Y / N
5. Do you understand the purpose of IQMS?  Y / N
6. Are you happy with how IQMS is being implemented?  Y / N
7. Are you getting support from SMT?  Y / N
8. Do you receive feedback after every evaluation?  Y / N

SECTION D

1. What are the challenges that your school is facing in the implementation of the IQMS?

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2. What would you change in the implementation of IQMS?

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ANNEXURE B

THE INTERVIEW SCHEDULE

1. What is your overall impression of the IQMS as it is currently designed and implemented in schools?
2. Have you personally benefitted from being part of the IQMS appraisal process?
3. Do you see the IQMS impacting on the culture of learning and teaching of school?
4. How did the IQMS contribute to your personal and professional growth?
5. Do you understand the contents and objectives of the IQMS?
6. Were you trained on IQMS?
7. What are the challenges that you encountered when implementing IQMS?
8. What are the strengths of the IQMS?
9. What are the weaknesses of the IQMS?
10. What would you change to rectify the situation?
23 May 2011

TO: The Principal

REQUEST TO ALLOW MS. Z MBULAWA TO CONDUCT RESEARCH IN EDUCATION DEPARTMENT

This is to confirm that Ms Z Mbulawa is pursuing her Master's Degree in Public Administration at Fort Hare University. As part of the requirements for the degree, the student is supposed to conduct a research and submit to us the Research report. The report is solely meant for academic reasons, and nothing else.

We humbly request you to allow Ms Mbulawa to conduct research in the Department of Education amongst others, to interact with relevant selected officials including committee members on issues related to her research. We have instructed the student to observe professionalism and ethical considerations by maintaining anonymity of the participants concerned.

Once the research is complete, it will be made available on request to Education Department for your attention. We hope that the findings of the research will benefit the Education Department and the provincial government as a whole.

Your support in this research endeavour is appreciated.

Regards,

Dr TR Mle (Supervisor)