

**THE MANAGEMENT OF PERFORMANCE MEASUREMENT IN THE  
IMPLEMENTATION OF THE INTEGRATED QUALITY MANAGEMENT  
SYSTEM (IQMS)**

by

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## DEDICATION

I dedicate this study to my wife, Pulane Mavis Makaota, for allowing me to complete this degree and in so doing sacrificed her own studies. God Bless.



## SYNOPSIS

The point of departure with this research project is that in 1996 the National Department of Education established a National Task Team on Education Management Development to review South Africa's education system and to make recommendations to improve the management of education (Department of Education, 2000c). In addressing the challenges and opportunities facing the education system in South Africa, various reform initiatives have been implemented including the introduction of curriculum reform of which one is the Integrated Quality Management System (IQMS). There has been a move towards shared decision-making whereby the School Management Teams (SMTs) and educators play a significant role hence the need to identify and overcome the challenges faced by the SMT in the management of the Performance Measurement (PM).

The research was prompted by questions such as:

- What challenges are there for the management of Performance Measurement?
- What recommendations can the SMT apply to overcome these challenges?
- How can Performance Measurement be managed to improve professional development of educators?

The literature review in chapter two revealed that the management of Performance Measurement (PM) could impact significantly on educator performance and individual development. The occurring continuous changes in the new appraisal system that prevail in our education system are in most cases, not educator friendly.

**Chapter three** gave an overview of the research design and the methodology used. A description of what “quantitative research” entails and how it compares to qualitative research was given. The advantages and disadvantages of the questionnaire as an instrument of collecting data for this investigation were also discussed. It concluded with a breakdown of the biographical details which consisted of tables substantiated by pie graphs.

**Chapter four** analysed and interpreted the data collected. The data was subjected to the Kaiser-Meyer-Olkin measure of sampling test. The thirty one (31) items were subjected to two successive factor analytic procedures that reduced the items to three factors. These factors were named: Effective management of Performance Measurement, Individual competence and Participative decision-making. The overall observation was that the literature findings concluded that the way SMTs manage the Performance Measurement system based on the responses indicated that educators are generally satisfied with its implementation.

**Chapter five** concluded with key findings and recommendations of this study. Contextual factors and the pay and salary progressions play a role in the management of the PM and the improvement of performance. The involvement of educators in the management of the PM and instructional decision-making, and the maintenance of a constant flow of vital information among educators and the SMT should be encouraged to overcome the challenges in managing PM. Opinions of educators must be valued, and the staff must be kept informed of the SMT’s quality effort to manage the PM system effectively. The education authorities together with policy-makers must implement a consultative approach to involve educators. Their inputs with regard, trends and in class experience are vital to implement or formulate policy and practices that will ensure the success of the management of the PM system.

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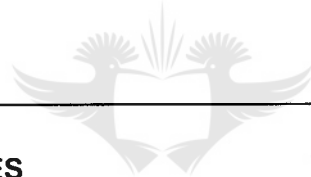


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## **CHAPTER ONE**

### **THE MANAGEMENT OF PERFORMANCE MEASUREMENT IN THE IMPLEMENTATION OF THE INTERGRATED QUALITY MANAGEMENT SYSTEM (IQMS)**

#### **INTRODUCTION AND BACKGROUND TO THE STUDY**

##### **1.1 INTRODUCTION**

Since 1994, key shifts in performance management in South African schools has been seen (Steyn, 2003: online) and in particular the role that principals play in this reform. There has been a move towards shared decision-making, where the South African Government has initiated programmes of management known as the Integrated Quality Management System (IQMS). IQMS is guided by Schedule 1 of the Employment of Educators Act, No 76 of 1998 and is defined in the Education Labour Relations Council (ELRC) Collective Agreement No 8 of 2003 as an Integrated Quality Management System that consists of three components which are supposed to complement one another, "without duplication of structures and procedures" (ELRC, 2003, 4).

The main objective of the Integrated Quality Management System (IQMS) is to ensure quality public education for all and to constantly improve the quality of teaching and learning. The Department of Education has the responsibility of providing facilities and resources to support teaching and learning (Gauteng Department of Education, Circular 18, 2007). Successful educational outcomes also depend on empowering, motivating, developing and rewarding educators and Quality Management seeks to monitor and support these processes (Gauteng Department of Education, Circular 18, 2007). Thus, IQMS is aimed at determining competence, evaluating strengths and making recommendations on areas of development, providing accountability for the overall effectiveness of the institution and promoting professional growth for educators (ELRC, 2003, 4).

As sections of IQMS, both Performance Measurement and Developmental Appraisal have to be completed in one school year and are linked to Whole School Development.

The guiding principle that guides this alignment is a central theme that runs through the document namely the tension between holding educators and schools to account through checking them and “measuring their “performance”, as well as showing commitment to developing human capacity and skills where required, together with assurances that the idea is not to be punitive or unfair. Thus, there can be no sanctions against individual educators before meaningful development takes place and as a result, the system’s focus is positive and constructive where performance needs to improve (ELRC, 2003, 6). IQMS acknowledges subjectivity in appraisal and outlines how this may be countered through “transparency and open discussion and quality controls” (ELRC, 2003, 6).

The three components of IQMS are aimed at enhancing and monitoring performance of the education system of which Performance Measurement (PM) is just one component. Performance Measurement is the annual process of assessing performance. Performance Measurement furthermore is:

- part of a larger process of linking individual performance management and development to organizational goals;
- only one aspect of managing and developing the performance of individuals;
- a cyclic and recurring process aimed primarily at performance improvement through ongoing learning and development (ELRC, 2003).

The purpose of Performance Measurement (PM) is to evaluate the individual educator for salary progression, grade progression, affirmation of appointments and rewards and incentives (ELRC, 2003, 3; NDOE, 2000). The principal plays a major role in managing this system for whole school development in conjunction with the School Management Team (SMT) (the principal, deputy principal and heads of department and democratically elected staff members), a Staff Development Team (SDT) which plans, oversees, coordinates and monitors all Quality Management processes (ELRC, 2003, 5), and the Development Support Group (DSG) which for every educator consists of his or her immediate superior, and one other educator (peer). The SMT and SDT work together on all matters relating to the Performance Measurement and mutually support one another. They coordinate all activities pertaining to staff development such as training and guidance of educators on the procedures and processes of PM, ongoing support during the two developmental cycles of evaluation each year (Baseline evaluation – in the first

term and Summative evaluation – in the last term) and completing the necessary documentation for Performance Measurement (for pay or grade progression) and finally, developing the School Improvement Plan (SIP) (ELRC, 2003, 3).

Self-evaluation forms part of both the components of IQMS namely, Developmental Appraisal (DA) and Performance Measurement (PM) (ELRC, 2003, 21). The pre-evaluation profile checklist is used for establishing the profile of any person who is being evaluated with the questions being used as a framework for a professional discussion between the evaluator and the evaluatee. A record must be kept of the answers provided (ELRC, 2003, 8).

The instrument of Performance Measurement consists of two parts. The first part (made up of 4 Performance Standards) is for observation of educators in practice and the second part (made up of 8 Performance Standards) is related to aspects for evaluation that fall outside of the classroom. Each Performance Standard (PS) includes a number of criteria and for each of these criteria there are four descriptors which are derived from the four rating scale (ELRC, 2003, 2). The rating scale is as follows:

- **Rating 1:** Unacceptable. This level of performance does not meet minimum expectations and requires urgent interventions and support.
- **Rating 2:** Satisfies minimum expectations. This level of performance is acceptable and is in line with minimum expectations, but development and support are still required.
- **Rating 3:** Good. Performance is good and meets expectations, but some areas are still in need of development and support.
- **Rating 4:** Outstanding. Performance is outstanding and exceeds expectations. Although performance is excellent, continuous self-development and improvement are advised (ELRC, 2003, 4).

When measuring educator performance, Performance Standards 1 to 7 are applicable to all Post Level 1 educators. Performance Standards 1 to 10 are applicable to HoDs (Education Specialists) and Performance Standards 1 to 12 are applicable to Deputy Principals and Principals (ELRC, 2003, 4). They are used to at least meet the minimum requirements for pay and/or grade progression. PM should be used to evaluate the

performance of educators within the period of a calendar/school year even though the award will only be made in the following year (ELRC, 2003, 7). For purposes of pay or grade progression **total scores** must be calculated. The final score (total) is used to arrive at an overall rating. A scoring sheet is attached at the end of the instrument to be used for this purpose. However, in order to qualify for salary progression and grade progression respectively the following minimum scores must be obtained.

Table 1.1 Scores for salary progression

| <b>Post levels</b>  | <b>Salary progression</b> | <b>Grade progression</b> |
|---|---------------------------|--------------------------|
| Post level 1 educators:<br>(Educators and Senior educators)         | 56                        | 78                       |
| Post level 2 educators:<br>(Education Specialists)                  | 84                        | 118                      |
| Post level 3 and 4 educators:<br>(Principals and Deputy Principals) | 104                       | 146                      |

There are different levels of evaluation: internal appraisals (Process A) and external evaluations for Whole School Evaluation (WSE) (Process B) (ELRC, 2003, 8). Process A consists of the establishment of structures; self-evaluation by individual educators; the development of an instrument plan for lesson observation of educators, and lesson observation by the DSG, who will make information of lesson observation available to the SDT for planning school improvement. Process B consists of drafting an external evaluation plan and informing schools timeously of dates for conducting external WSE; advocacy and training around the PM and informing schools what documents will be required; a preparatory visit to the school; observation of educators and writing a report (ELRC, 2004; NDOE, 2000)

When measuring educator performance, educators should familiarise themselves with the instrument, the Performance Standards, the criteria as well as the levels of performance. A clear and common understanding of the Performance Standards should



be established in order to facilitate a moderation process that would ensure scores that are reflecting the true performance of every educator. Educators should meet different score requirements in order to qualify for salary progression, accelerated salary progression or grade progression (Gauteng Department of Education, Circular 54, 2006). In order to qualify for accelerated salary progression in a specific year, educators should fall into a specific group (Gauteng Department of Education, Circular 54, 2006). The educator undertakes self evaluation, identifies a Development Support Group (DSG) and then draws up a Personal Growth Plan (PGP) which provides guidelines, before finalising the preparation plan for development (ELRC, 2003, 2). After the baseline evaluation, further discussions on the development of the PGP need to take place. In other words, Performance Measurement should be managed to provide the School Management Team with an opportunity to identify the strengths and weaknesses of the educators and how to use their Personal Growth Plans to develop the School Improvement Plan. In order to address these challenges, the SDT should provide educators with guidance, coaching, counseling and mentoring.

After identifying the personnel, DSG the educator needs to be evaluated, for the purpose of determining a “baseline” evaluation with which subsequent evaluation(s) can be compared in order to determine progress (ELRC, 2003, 8). Evaluation of the Educator (Level 1) is carried out by Education Specialist/Head of Department (HoD) or Principal where there is no HoD. Evaluation of Head of Department/Education Specialist (Level 2) is carried out by Deputy Principal or Principal, Deputy Principal by Principal, Principal by Regional/District/Area Manager or his/her delegate (ELRC, 2003, 10).

Then the educator, together with the DSG, identifies areas that need development and sets timeframes for the period of development. The educator must co-operate with the DSG and the External WSE team in line with the protocol when the school is being evaluated. The educator must attend INSET and other programmes offered by the School Management Team (SMT) in terms of areas identified for development and engage in feedback and discussion (ELRC, 2003, 2).

IQMS brings all the systems dealing with development together under one roof and is the instrument that ensures professional development of educators and improvement of the particular learning institution. The system meets professional standards for sound quality

management, including propriety (ethical and legal), utility (useable and effective), feasibility (practical, efficient and cost effective) and accuracy (ELRC, 2003, 6). The IQMS thus reinforces the existing hierarchies of control and line management within schools. These probably evolved during the course of school history and have become embedded in the culture and day-to-day running of the institution (ELRC, 2003, 5).

Besterfield D, Besterfield C, Besterfield G and Besterfield M, (2003:167) stress that managing an organization without performance measures is like a captain of a ship navigating without instrumentation. The ship would most likely end up travelling in circles, as would an organization. Measures should be taken by the SMT to address challenges faced with the implementation of IQMS in order to pave the way for Performance Measurement to play a role in both institutional and individual growth. In other words, failure to apply Performance Measurement system to educators, one may find that some of the dimensions (new appointments and incentives) and the increasing educator satisfaction which is identified as an outcome to be rewarded and encouraged are not measured. In this case, the SMT should develop means to measure the dimensions within the Performance Measurement.

In order to achieve institutional and individual growth, Performance Management focuses on an ongoing process which includes educator goal setting, as well as rewards and individual development. However, when implementing a Performance Management system, the SMT will need support, encouragement and recognition of achievement and as well as motivation if they are to be more effective. Dean explains that institutional and individual educator growth is ultimately what good performance management sets out to achieve (2002:1). Furthermore, Dean (2002: 1) explains that “good performance management leaves all staff, teaching and non-teaching, feeling supported in their work, encouraged by recognition of their achievement, helps to overcome their problems they may encounter, and happy in feeling part of a team in which people care for each other” (2002: 1). An efficient SMT promotes staff morale, high expectations and sets a good example with regard to team-work. A good SMT also practices consistency in their approach to agreed policies for behaviour, rules and management, assessment and marking, homework and parental involvement (Dean, 2002:36).

Performance Measurement depends upon effective leadership and good management at all levels with leadership originating with the principal, whose vision for the school should

empower other members of the staff (Dean, 2002: 30). In other words, the SMT should use the school's vision and mission statement to motivate the educators in achieving the objectives of Performance Measurement. The researcher is of the view that this information may be used to better implement PM. This may lead to professional development and may enhance educators' teaching and may ultimately have an effect on learning.

## **1.2 RATIONALE FOR THE STUDY**

The researcher is of the view that the effect of IQMS on professional development is important and thus derives the desire to study it. The professional view is that, the researcher wants to ensure that the management of PM as part of IQMS is well facilitated and that there is no resistance from educators during its execution. The researcher's academic point of view is that there is a gap in researching IQMS especially as it is a new innovation in the education system.

## **1.3 STATEMENT OF THE PROBLEM**

The problem to be researched is how to effectively manage the implementation of performance for effective teaching and learning. Taking the preceding information into account the research problem can be encapsulated with the following question.

What are the challenges facing the SMT in the implementation of Performance Measurement as a component of IQMS?

In view of the above, the following research problems can be formulated:

- What is the nature of performance measurement?
- What are the perceptions of educators on the management of the implementation of performance measurement?
- What guidelines should be used for the management of the implementation of Performance Measurement?

## **1.4 RESEARCH AIMS AND OBJECTIVES**

The researcher's aim is to identify the challenges facing the SMT in the implementation of Performance Measurement as a component of IQMS.

The specific aims therefore are:

- To explore the nature of performance measurement.
- To probe the perceptions of educators on the management of the implementation of performance measurement.
- To provide guidelines on the management of the implementation of Performance Measurement.

In view of the preceding problem statement and the research aims, the theoretical framework envisaged researching the School Management Team facing challenges in the Performance Measurement, will be discussed in the following paragraph.

## **1.5 THEORETICAL FRAMEWORK**

This research is located within the literature study of Total Quality Management (TQM). Total Quality Management is a management approach that originated in the 1950' and has steadily become more popular since the early 1980'. Total Quality Management, TQM, is a method by which management and employees can become involved in the continuous improvement of the production of goods and services. According to Hashmi (2006:3) TQM is a combination of quality and management tools aimed at increasing business and reducing losses due to wasteful practices. TQM is further defined by Hashmi as a management philosophy that seeks to integrate all organizational functions (marketing, finance, design, engineering, and production, customer service, and so forth) to focus on meeting customer needs and organizational objectives. In other words, TQM forms the basis for IQMS and becomes the art of managing the whole to achieve excellence in the PM. The relationship of TQM with Performance Measurement includes the continuous support of the School Management Team to drive Performance Measurement and participation of educators in decision-making of the management of the system. Jablonski (1992: 21) explains that TQM is a co-operative form of doing business that relies on the talents and capabilities of both labour and management to

continually improve quality and productivity using teams. Embodied in this definition are the three ingredients necessary for TQM to flourish in any company which are:

- (1) Participative management;
- (2) Continuous process improvement; and
- (3) The use of teams (Jablonski, 1992: 21).

Thus the SMT, as part of a new democratic structure of school management embodies the ideal of participative management and in addition, the ideas and views of other structures within school governance such as SDT and the DSG should also be accommodated in the decision-making of such a process as PM. In other words, in the context of educational management, TQM forms a system of continuous improvement employing participative management centred on the needs of individual educators such as better salaries, resources and professional development. Furthermore, continuous improvement must deal not only with improving results, but more importantly with improving capabilities to produce better results in the future. The five major areas of focus for capability improvement are demand generation, supply generation, technology, operations and people capability (Hashmi, 2003:3).

TQM views an organization as a collection of processes. It maintains that organizations must strive to continuously improve these processes by incorporating the knowledge and experiences of workers (Hashmi, 2003:1). In other words, educators should be encouraged to apply their skills, knowledge and competence to ensure the efficient management of PM.

## **1.6 METHOD OF THE RESEARCH**

In this study, the researcher opted for a quantitative method as it is one in which the researcher primarily uses post positivist claims for developing knowledge (i.e. cause and effect thinking, reduction to specific variables and hypotheses and questions, use of measurement and observation, and test of theories), thus facilitating comparison and statistical aggregation of the data (Creswell, 2003:18). Quantitative methods are standardized measures that merge diverse and various opinions and experiences into predetermined responses. In order to identify the challenges facing the SMT in managing PM, a structured questionnaire was used to collect data by using stratified random sampling. Stratification ensures that both females and males are represented in the

sample and the sample reflects the true proportion of individuals with certain characteristics of the population (Creswell, 2003:156). In random sampling each member of the population under study had an equal chance of being selected (Creswell, 2003:156). Quantitative studies included a substantial amount of literature to provide direction for the research questions or hypotheses. In this study, the research questions were structured to explore perceptions of respondents about PM and the literature was used deductively as a framework for the research questions or hypotheses. The literature study is based on the documentary sources on all aspects pertaining to the implementation and management of PM as part of IQMS. Documentary sources that were used included primary and secondary sources. Primary sources, which were considered as important in this study included policy documents such as The South African Schools Act of 1996, Departmental Circulars and Government Gazettes. Each source was carefully selected, analyzed and studied with the purpose of drawing out only relevant, authentic objectives, and valid and reliable data on the management of PM.

#### **1.6.1 Data collection strategy**

A study of the literature was first conducted to identify the challenges facing the SMT in the management of the PM. This was followed by the collection of information from educators of both Secondary and Primary schools. Thus, data was collected through questionnaires with educators in selected schools in the Zeerust, Bojanala West regions (North West Province) and the District D4 of the Gauteng Province.

#### **1.6.2 Sampling**

Purposive sampling will be used in this study because it focuses on selecting information rich cases whose study will illuminate the question under study. Sampling plays a role in ensuring that the results gained are representative of the cases chosen in the sample. From sample results, the researcher generalises or makes claims about the population (Creswell, 2003:153). The research was undertaken in the Zeerust, Bojanala West regions (North West Province) and the District D4 of the Gauteng Province amongst educators on different post levels. The sample obtained reflects the perception of educators with regard to the management of PM in the implementation of IQMS at schools.

## 1.7 DEMARCATION OF THE RESEARCH

The research focused on public schools in the Zeerust, Bojanala West regions (North West Province) and the District D4 of the Gauteng Province. The investigation took place under the jurisdiction of the University of Johannesburg (UJ). An identification of challenges facing the SMT in managing PM supported the aims of this study. In order to accomplish this, a structured questionnaire was circulated to Principals, School Management Teams and PL1 educators working in the selected schools.

## 1.8 VALIDITY

Validity refers to whether the indicator actually measures what it is supposed to measure (Salaman, Storey & Billsberry, 2005:324). For example, a high production of a particular school in terms of educator performance might be taken as an indicator of managing PM effectively. However, it is possible that factors outside the control of the SMT could have an adverse effect on educator performance, and thus it might not be a valid indicator of the effective management of the PM. One can conclude that not all aspects of performance can be easily measured and quantified. For example, the SMT may be able to judge whether educators are competent (with respect to performance in teaching) or not, but find it difficult to put a precise figure on how competent they are. Furthermore, it is necessary for the researcher to become accustomed to thinking not of an instrument's validity but rather of its validities. This is because validity refers broadly to the degree to which an instrument is doing what it is intended to do (De Vos, 2005:166).

The data was collected through a primary resource such as a literature study and a structured questionnaire. The structured questionnaire consisted of two sections. Section A consisted of ten (10) biographical items of the respondents whilst Section B consisted of thirty one (31) open ended questions to identify the challenges with regard to the management of performance measurement (PM). The questionnaire was formulated based on the aim of the study which is to **identify the challenges faced by the SMT in managing Performance Measurement in the implementation of the IQMS system**. The completed questionnaires were submitted to The University of Johannesburg for analysis by Statkon.

## **1.9 RELIABILITY**

Reliability is defined as the accuracy or precision of an instrument; as the degree of consistency or agreement between two independently derived sets of scores; and as the extent to which independent administrations of the same (or similar) results under comparable conditions (De Vos, 2005:168). According to Salaman, Storey & Billsberry, 2005:324, reliability means that similar results will be discovered if the measure is used on the same object or person by different people and/or at different times. In other words, the researcher will use data collected from a large number of the respondents that have been involved in identifying the challenges in the management of PM. Furthermore, reliability refers to the fact that different research participants being tested by the same instrument at different times should respond identically to the instrument (Mouton, 1996:144). The measure will be used on the very same respondents which may acquire similar data about PM. This may reflect repeatability of the respondents' reliable data on the structured questionnaire.

## **1.10 ETHICAL ASPECTS OF THE RESEARCH**

Ethical measures are viewed as important in the research process. Respondents cannot be viewed as objects; they are the subjects upon which the researcher relies to obtain information (Henning, Van Rensburg & Smit, 2004, 73). The ethical standards of the proposed study are prescribed by the University of Johannesburg (UJ) and are merely a guideline to the researcher to interact with the respondents as well as the data they provide which will be respected and followed throughout this study.

In reflecting on the intended research, one would be very careful when dealing with educators, heads of departments and principals. The participants were informed of the purpose of the research and what contribution their information would attribute to the study. The researcher was responsible for maintaining ethical standards by ensuring anonymity of the participants, their right to privacy, and the individuals' right to decide when, to whom and to what extent information can be revealed. Participants were made aware of their right to withdraw without penalty if they felt uncomfortable anytime during the process of the research. Confidentiality was being guaranteed at all times and the information that they have given would only be released with their permission.



## 1.11 CLARIFICATION OF CONCEPTS

It is necessary to have a clear understanding of concepts, as they imply things in different contexts to different people. The primary concepts used in this research are as follows:

- IQMS is defined in the Education Labour Relations Council (ELRC) Collective Agreement No 8 of 2003 as an **Integrated Quality Management System** that consists of three components which are supposed to complement one another, “without duplication of structures and procedures” (ELRC, 2003, 4).
- **Performance Measurement** is the process of assessing the annual performance and its purpose is to evaluate the individual educator for salary progression, grade progression, affirmation of appointments and rewards and incentives (ELRC, 2003, 3; NDOE, 2000).
- The **School Management Team (SMT)** (the principal, deputy principal and heads of department and democratically elected staff members), a **Staff Development Team (SDT)** which “plans, oversees, coordinates and monitors all Quality Management processes (ELRC, 2003, 5), “and the **Development Support Group (DSG)** which for every educator consists of his or her immediate superior, and one other educator (peer) are structures required to implement PM.
- **Developmental Appraisal (DA)** is a policy that facilitates the personal and professional development of educators in order to improve the quality of teaching practice and educational management. It is part of a need analysis that informs in-service training (INSET) (Department of Education, 1999:40).
- The **School Improvement Plan (SIP)** (ELRC, 2003, 3 is developed from all educators’ Growth Plans, in other words the SIP is informed by the Growth Plans which reveal the strengths and weaknesses of the school.
- **Total Quality Management (TQM)** is a method by which management and employees can become involved in the continuous improvement of the production of goods and services. It is a combination of quality and management tools aimed at increasing business and reducing losses due to wasteful practices (Hashmi, 2003:1).

## 1.12 PLAN OF THE STUDY

**Chapter 1:** Introduced the study and outlined the background. The problem was stated and the rationale was discussed. In addition, the research question, aims and objectives were revealed. The research methodology was briefly discussed taking into account data collection strategies, sampling, validity, reliability and the ethical aspects of the research. Finally concepts were clarified.

**Chapter 2:** Focuses on a literature study and the theoretical framework within which the research is based and about the impact of TQM on school improvement, school improvement, performance appraisals, educator empowerment, benchmarking and motivations.

**Chapter 3:** Concentrates on the research design, the development of the research instruments and the empirical investigation.

**Chapter 4:** Focuses on the empirical findings. The findings are analyzed, tabulated and interpreted.

**Chapter 5:** Deals with a summary of the previous chapter, the empirical research findings, the literature findings, as well as the recommendations that follow from the findings.

## 1.13. SUMMARY

To ensure and monitor Performance Measurement in education, it is imperative that the School Management Team administers the institution in its entirety. In other words, every member of the SMT must play an important role in the management of the PM system. This will mean that the SMT will have to be primarily responsible for the management, planning and organization of Performance Measurement which is done accurately and in consultation with the educators. The acquisition of organizational skills is necessary for the SMT to ensure that time and resources are used effectively and efficiently to ensure the effective management of Performance Measurement. The researcher is of the view that this information may be used in managing and implementing PM. This may lead to

professional development and may enhance educators' teaching and may have an effect on learning.

In the following chapter, Chapter 2, the literature is reviewed and a theoretical framework is developed.



## **CHAPTER TWO**

### **LITERATURE REVIEW**

#### **2.1 INTRODUCTION**

In this chapter, the purpose of the literature review is to provide information to identify the challenges faced by the School Management Team (SMT) in the management of Performance Measurement (PM). This will be done through a review of existing literature including publications and books available on the research topic, in order to clarify and further investigate what has already been researched in this area. A literature survey provides a framework for establishing the importance of the study, as well as a benchmark for comparing the results of the study with other findings (Creswell, 2003:30) and will assist the researcher further in demarcating the study. The literature review will be discussed under the following heading: Total Quality Management (TQM) and Organizational Theories.

#### **2.2 TOTAL QUALITY MANAGEMENT AND ORGANIZATIONAL THEORIES**

This study is located within the Total Quality Management (TQM) and Organizational Theories. TQM is a management philosophy that seeks to integrate all organizational functions to focus on meeting customer needs and organizational objectives (Hashmi, 2003:1). TQM views an organization as a collection of processes. It maintains that organizations must strive to continuously improve these processes by incorporating the knowledge and experiences of workers (Hashmi, 2003:1).

##### **2.2.1 The impact of TQM on School Improvement and Performance Measurement**

TQM is the foundation for activities, which include:

- Commitment by senior management and all employees
- Meeting customer requirements
- Reducing development cycle times
- Just In Time/Demand Flow Manufacturing
- Improvement teams

- Reducing product and service costs
- Systems to facilitate improvement
- Line Management ownership
- Employee involvement and empowerment
- Recognition and celebration
- Challenging quantified goals and benchmarking
- Focus on processes / improvement plans
- Specific incorporation in strategic planning (Hashmi, 2003:2)

This shows that TQM must be practiced in all activities, by all educators and structures such as the SMT, SDT and the DSG should assist in addressing the challenges as this may lead to school improvement in terms of educator performance. In other words, the ideas and views of teams such as SDT and DSG should be accommodated in the decision-making process to ensure the efficiency of managing Performance Measurement. Besterfield, et al, (2003:1) define TQM as both a philosophy and a set of guiding principles that represent the foundation of a continuously improving and developing the organization. In other words, if educators know what is expected of them in terms of the schools' objectives and aims, TQM may impact positively and enhance performance. Furthermore, TQM is defined as the application of quantitative methods and human resources to improve all the processes within an organization and exceed customer needs now and in the future (Besterfield, et al, (2003: 1).

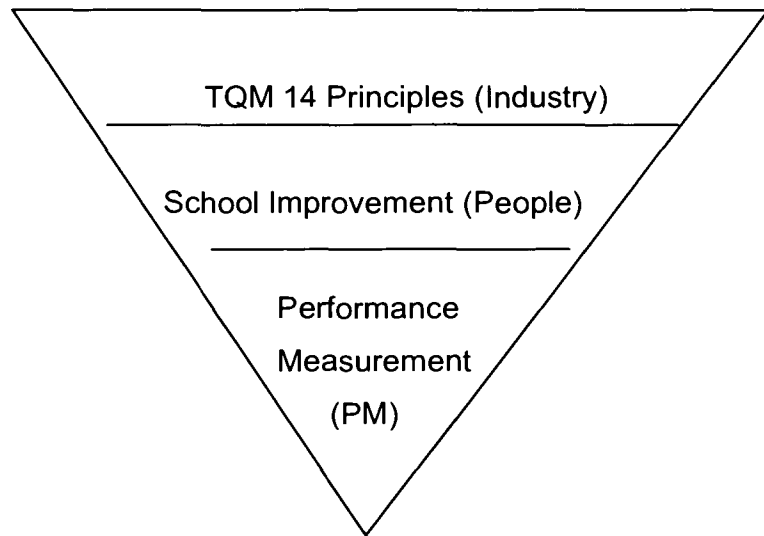
This, however, can be adapted to education whereby an effective SMT ensures that educators know how they are performing on a regular basis, the school is adequately resourced and that effective performance may be rewarded when Performance Appraisal is properly conducted. It can be seen that the adoption of principles of TQM to education can be used as a door to school improvement.

**Table 2.2.1** The key principles of TQM are as follows:

| <b>Management Commitment</b>         | <b>Employee Empowerment</b> | <b>Fact Based Decision Making</b> | <b>Continuous Improvement</b>       | <b>Customer Focus</b>                        |
|--------------------------------------|-----------------------------|-----------------------------------|-------------------------------------|--|
| Plan (drive)                         | Training                    | Statistical Process Control       | Systematic measurement              | Supplier partnership                         |
| Do (participate)                     | Suggestion scheme           | The 7 statistical tools           | Excellent teams                     | Service relationship with internal customers |
| Check (review)                       | Measurement and recognition | Team Oriented Problem Solving     | Cross-functional process management | Never compromise quality                     |
| Act (recognize, communicate, revise) | Excellent teams             |                                   | Attain, maintain, improve standards | Customer driven standards (Hashmi, 2003:2)   |

TQM is mainly concerned with continuous improvement in all work, from high level strategic planning and decision-making, to detailed execution of work elements on the shop floor. In other words, the role of the SMT in managing the PM efficiently may ultimately lead to continuous and consistent improvement of professional development of educators, in all aspects of educator performance.

In other words, whilst TQM and School Improvement may involve an individual and internally motivated approach for PM to be efficiently managed, measure of effectiveness can be both internally and externally imposed and monitored by the SMT.



**Figure 2.2.1** The impact of TQM on School Improvement and Performance Measurement (Jablonski, 1992:21).

Jablonski (1992: 21) defines TQM as a cooperative form of doing business that relies on the talents and capabilities of both labour and management to continually improve quality and productivity using teams. Embodied in this definition are the three ingredients necessary for TQM to flourish in any institution:

1. Participative management.
2. Continuous process of improvement.
3. Use of teams.

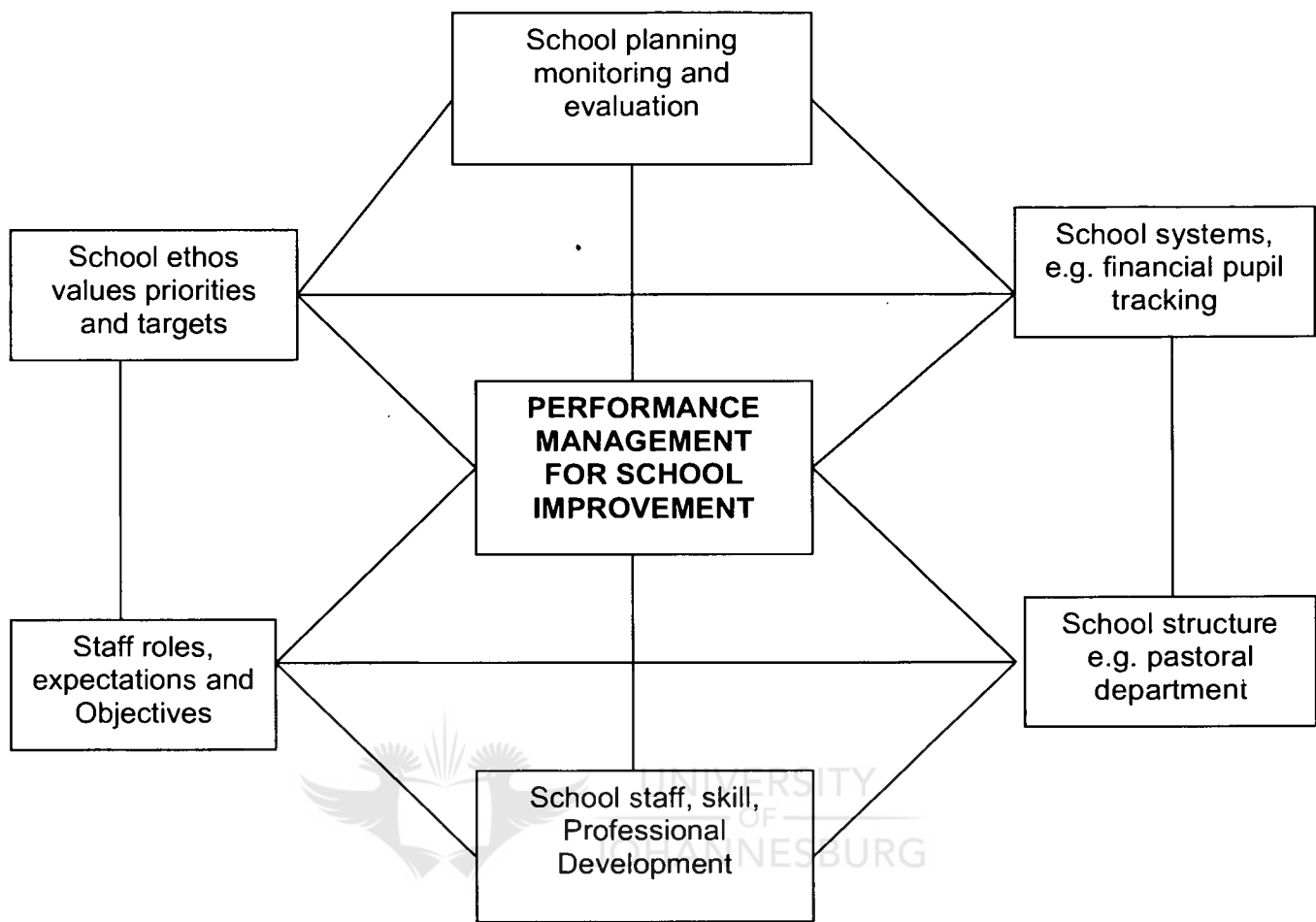
The adoption of any of the three ingredients for TQM to bring about School Improvement, involves thinking and management at a strategic level. In other words, in all three, emphasis is on the long-term development and improvement of the school based on the importance of shared values by school teams such as the Staff Development Team (SDT) and the Development Support Group (DSG) and of the involvement of the whole personnel which plays a significant role as key elements of both TQM and School Improvement to address challenges facing the SMT in the management of PM. Therefore, the SMT should play a role in encouraging educators to participate in the implementation and management of PM for school improvement.

### 2.2.2 School Improvement

School Improvement is a systematic, sustained effort aimed at a change in learning conditions and other related internal conditions, with the ultimate aim of accomplishing educational goals more effectively (ELRC, 2003:12). Furthermore, School Improvement is about developing strategies for educational change that strengthens the school's organisation, as well as implementing curriculum reforms (ELRC, 2003:12). The School Improvement Plan (SIP) (ELRC, 2003:12) is an important document, which enables the school to measure its own progress through the process of ongoing self-evaluation. This must happen continuously, especially in the years in between the cyclical external WSE (ELRC, 2003:12). The SIP is developed by the SDT and informed by the educator's PGP (ELRC, 2003:11) which may include challenges such as resources, incentives, planning, monitoring, evaluation and other contextual factors. It is submitted to the District office through the process of negotiation. This plan gives an opportunity to address recommendations made to the school (ELRC, 2003:12).

In other words, whilst the SMT manages and evaluates educator performance, good performance should be celebrated and rewarded. Educators should be urged to strive for professional improvement, keeping up with new developments in education and specific areas of specialization, particularly take note of legislative changes that directly affect one's work. The national policy on education, the national statements and the whole school development, assessment and appraisal system require new mindsets (Moloi, 2002: 26-27). It is important for the SMT to play a role in the interpretation and understanding of these legislative documents. Bisschoff (2001:152) states that in their capacity as managers of schools, principals should be supported and guided by Departmental officials with respect to matters such as the interpretation, implementation and execution of departmental instructions. In other words, the SMT faces the challenge of developing appropriate policies, strategies and effective structures to address the challenges in managing the PM and in supporting the personal and professional growth of educators.





**Figure 2.2.2** shows the Integration of Performance Management with other key processes for School Improvement (Jones, 2001:3). It makes little sense for management of the PM to proceed without referring closely to the Schools Development Plan. Successful integration involves aligning:

- The school 's strategic plans and goals with individual and team objectives;
- The values and capabilities of the school with the values and capabilities achieved by individual teachers; and other performances management strategies with other 'people' strategies, such as valuing, rewarding and developing (Jones, 2001:3). This implies that the relationship of TQM and PM may impact on School Staff and their Professional Development.

### **2.2.3 Performance Appraisal**

Performance Appraisal plays an important role in determining and communicating to an employee how he or she is performing on the job, ideally establishing a plan of improvement. In other words, when properly conducted, performance appraisals not only let employees know how well they are performing but may also influence their future level of effort and task direction.

TQM can be adapted to education in order to play a role in formalizing the process of subjective PM which can be carried out via a system of appraisal. Appraisal systems can take many forms, from annual verbal discussions between an employee and their superior, to systems which may include written reviews from peers and subordinates, as well as superiors and the use of various quantitative performance indicators (Salaman et al, 2005:325). In other words, Performance Appraisal plays a role in the process of evaluating how well employees perform their jobs when compared to a set of standards, and then communicating that information to those employees.

Performance Appraisal is seen by many writers as central to the development of TQM, as it plays a vital role in providing a two-way vehicle for SMT's and educators in developing, monitoring and assessing individual and school performance. In other words, the relationship of TQM with PM plays a role in the continuous support of the SMT in managing PM to ultimately lead a school to achieving continuous improvement of performance, a culture of quality, professional development and the commitment of organized educators.

### **2.2.4 Benchmarking**

Besterfield et al, (2003:207) state that benchmarking is a systematic method by which organizations can measure themselves against the best industry practices. These result in a search for best practice, those that will lead to superior performance, through measuring performance, continuously implementing change, and emulating the best (Oakland, 1996:181). This implies that the culture of quality developed in TQM plays a role in benchmarking as the search for best means to address the challenges of managing PM that may lead to high educator performance. If benchmarking is adapted to

education, resources are adequate and incentives are in place, quality teaching may later be improved. It may promote educator superior performance by providing an organized framework through which the SMT may learn how to address the challenges in managing PM, and understand how best to implement change to close the gap. Benchmarking may raise expectations about the foundation upon which Performance Measurement is built and managed by the SMT but without benchmarks, goals that must be achieved in terms of managing PM may have a tendency to be self-serving and may not be achieved.

According to Besterfield et al, (2003:207), benchmarking searches systematically for best practices, innovative ideas, and highly effective operating procedures. Thus, benchmarking plays a role in accommodating new ideas from educators with respect to their perceptions about PM and adapting them to assist the SMT in addressing the challenges they face in managing the PM. Benchmarking may be achieved when the SMT stresses educator pride and satisfaction rather than the establishment of quantifiable goals. Therefore benchmarking can become one of the tools to help the SMT develop those strengths and reduce weaknesses in educator performance. In this case, benchmarking plays a role in enhancing innovation by requiring the SMT to constantly use the information and perceptions obtained from educators to manage the PM system to improve personal and professional growth and development.

### **2.2.5 Educator Empowerment**

If a school is going to create and maintain teacher empowerment, the principal must adopt a servitor leadership style (Bradley, 1993:152). In other words, this style can enable the principal to serve the needs of the educators and this is consistent with empowerment. In addition, this style of leadership can enable educators to assume more professional responsibilities and allow teacher leadership to take place. A school system with empowerment in the educational programme is one where the clients, staff, board, teachers and administrators acknowledge possession of the programme (Bradley, 1993:150). In other words, the staff gives the educational programme of PM its rightful recognition and maintains its support by giving more of their performance to ensure that PM is managed. According to Bradley (1993:149) the key elements of teacher training are (1) training, (2) time, (3) money and (4) ongoing district support. However, in order to

accomplish these, educators must be given adequate information regarding the management of the new system of IQMS.

Key steps in the process of teacher empowerment are:

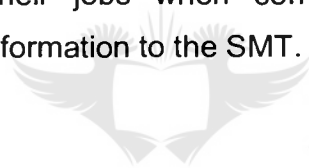
- Leadership is critical in cultivating participatory management, thus principals need training to act in that role.
- Empowering teachers with more decision-making authority requires that a critical mass of teachers be willing to spend extra time and energy.
- Staff development is another critical factor particularly in the training of communication skills, in conflict resolution, and team building.
- The development of trust among teachers and between teachers and the school management is an important step in the empowerment of teachers (Bradley, 1993:149).

Empowerment plays a role in producing better decision making and school management in managing PM. However, educator and the SMT involvement, as well as the responsiveness in the management of the PM system, can be the crux of empowerment.

### 2.2.6 Motivation

Motivation plays an important role as a requirement for educator performance and development. This implies that people have to be activated in some way to choose a particular line of action, and then having chosen that direction, they choose to maintain that behaviour for some period of time. The question is whether the SMT can in any way influence the direction and strength of the motivation to successful management of the PM in the implementation of IQMS at schools. In other words, the SMT must have some understanding of how motivation can be aligned with PM to address the challenges of managing PM and achieving the school's objectives. Teachers often argue that pay and working hours are essential to personal well being (Foskett and Lumby, 2003:79). Promotions, for example, a possible element of a performance management system, are often made on the basis of subjective assessments of a person's performance and suitability for a new job (Salaman et al, 2005:325).

The challenge for a performance management system is that its procedures should be auditable, so that it can be verified that any measures are being used fairly and effectively (Salaman et al, 2005:325). In this case, the availability of incentives and monetary rewards and the allocation of resources play a role in motivation and satisfaction that enable educators to make a significant contribution to teaching and improve their professional development. In other words, incentives and financial rewards play a role as motivating factors on educator performance. The manner in which the SMT manages the PM may impact on educator performance. Furthermore, this may become a serious challenge to the SMT if PM becomes monetary driven in the minds of educators, despite the need to improve performance of teaching and professional development. This may enable the SMT to seek solutions for performance shortcomings and address personal problems that affect work or career progression. In other words, the SMT can seek to influence the factors which impact on the management of PM at different levels such as conditions conducive to teaching and improved salaries. In this case, Performance Appraisal plays a significant role in the process of evaluating how well educators perform their jobs when compared to a set of standards, and then communicating that information to the SMT.



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### **2.3 SUMMARY**

SMT's can promote and improve educator performance in schools under their jurisdiction, despite the severe challenges they face in the management of PM. Management teams can do much to encourage professional development of their staff members to ensure personal commitment to achieve the school's strategic goals. It is true that schools experience challenges that prevent them from responding to strategies for improving management of Performance Measurement. Thus, schools should provide activities that are properly developmental (e.g. orientation or induction programmes, performance management programmes, coaching and mentoring) in order to attain professional competence.

The close working relations between SMT's and the educators should be maintained at all times for improving performance of the institutions. In order to manage performance measurement appropriately, school management teams should evaluate their individual performance and potential, to understand their concerns, social and political situation in

schools and to relate to each educator in a way that suits them both. The school management team will acquire valid knowledge of their educators through performance measurement, appraisal reports, meetings, interactions and other sources of information.

Performance Measurement plays a potential role of transforming learning institutions but only if the system yields professional development opportunities. This formal process can succeed in improving performance only if the individuality of each educator is recognised as an important element. Therefore, management of PM and review can give an account of performance that is a prelude to development. Performance review systems should be recommended to address the insufficient care in implementation strategies, particularly with educators not well trained or supported sufficiently to manage the Performance Measurement system. In order to move swiftly with this system, the management should recognise the impediments in implementing and managing PM and attempt to resolve issues internally to achieve an agreed system which balances support and accountability. The Department of Education should be commended in its efforts to support educators to achieve a satisfactory salary progression and grade progression through performance measurement as it has striven to move forward by balancing the strong accountability element of previous inspection regimes with a more positive determination to provide professional support to educators by implementing a Performance Measurement system.

## **CHAPTER THREE**

### **RESEARCH DESIGN**

#### **3.1 INTRODUCTION**

The specific aim of the study was highlighted in Chapter two. The study's main aim was to determine the challenges facing the School Management Team (SMT) in managing Performance Measurement (PM) in the implementation of IQMS. The third chapter outlines the methodology used by the researcher to collect data which provides clarity on the following aspects of the research: the research design and purpose of the quantitative research; the design of the questionnaire and sampling technique; a discussion of some questions used in the questionnaire, and a discussion of the respondents used, biographical details requested and the return of the questionnaires.

#### **3.2 THE RESEARCH DESIGN**

The research design is defined as a set of guidelines and instructions to be followed in addressing the research problem. The main function of a research design is to enable the researcher to anticipate what the appropriate research decisions should be so as to maximise the validity of the eventual results (Mouton, 1996:107).

The aim of this research is to determine the challenges faced by the SMT in managing the Performance Measurement system. A sample of educators can be used to investigate the strategies necessary for the effective implementation and management of the new system within the North West and Gauteng Provinces.

#### **3.3 THE QUANTITATIVE RESEARCH APPROACH AND PURPOSE**

Quantitative research plays a role in a formal, objective and systematic process in which data is utilized to obtain information for a particular study. In other words, in quantitative research numerical data can be collected. This is closely connected to the final part of the definition: analysis using mathematically based methods (Muijs, 2004:1-2). In other words, data should be in numerical form in order to be able to use mathematically based

methods. Furthermore, quantitative research becomes a form of conclusive research involving large representative samples and fairly structured data collection procedures. Data will be collected from the respondents and transcribed in the form of scores that can be arranged in a tabulated form and be analyzed.

Quantitative research tends to measure constructs through the use of questionnaires. The researcher manipulates one or more independent variables to determine whether or not these manipulations cause an outcome in the dependent variable. In other words, the intent of using the variables quantitatively will be either to relate variables or to compare samples or groups in terms of an outcome. Deductive reasoning is fundamental to quantitative research. Quantitative research is all about quantifying relationships between variables. The researcher expresses the relationship between variables using effect statistics such as correlations, relative frequencies or differences between means.

Consequently, one cannot describe quantitative research without considering deductive reasoning which is fundamental to this type of research. According to Borg and Gall (1993:195), quantitative researchers make the assumption that they can discover laws that lead to reliable prediction and control of educational phenomena. They view their task as the discovery of these laws by searching for irregularities in the behaviour of sampled individuals. This search is aided by statistical analysis, which reveals trends in the sample's behaviour. Quantitative researchers believe that such trends or laws are sufficiently strong to have practical value, even though they do not allow for perfect prediction or control.

The purpose of quantitative research is to generalize findings from a sample to a larger group of individuals called the population (McMillan & Schumacher, 1993:153). Furthermore, quantitative research tends to measure constructs through the use of questionnaires. In view of the latter quotes, one can conclude that the purpose of quantitative research is to make objective descriptions of a limited set of phenomena and also to determine whether such phenomena can be controlled through interventions.

One can briefly consider features associated with the Quantitative approach in the following table defined by Burns and Grove (1997):



**Table 3.1 Features associated with a Quantitative approach versus a Qualitative approach**

| <b>Quantitative Research Methods</b>  | <b>Qualitative Research Methods</b> |
|---------------------------------------|-------------------------------------|
| Both are systematic in their approach |                                     |
| Statistical analysis                  | Text and image analysis             |
| Objective                             | Subjective                          |
| Deductive                             | Inductive                           |
| Generalisable                         | Not generalisable                   |
| Numbers                               | Words                               |

### **3.4 THE RELATIONSHIP OF THE RESEARCHER TO THE SUBJECT**

The purpose of quantitative research is for the researcher to generalize findings from a sample or make claims about the population (Creswell, 2003:153). In other words, data was collected from these individuals who participated in the study. Quantitative research plays a significant role in displaying the objectivity in measuring the human world, predicting and controlling human behaviour, and testing hypotheses such as the working environment of respondents. Furthermore, this objectivity does not allow the researcher's personal values, beliefs and biases to influence the process of data collection, nor should he or she be influenced by it.

#### **3.4.1 Sampling technique**

Sampling in this research project plays an important role in producing representative selections of population elements. In other words, it is a process of selecting things or objects when it is impossible to have knowledge of a larger collection of these objects (Babbie and Mouton, 2002:164). A random sampling was drawn from the sub-population that makes up the entire population targeted for this research project. Schools in the Zeerust/Bojanala West regions (North West Province) and those in the District D4 of the Gauteng Province were randomly selected for this research project.

Two hundred questionnaires were distributed by the three researchers who formed part of the Project Group completing MEd (degree) at the University of Johannesburg. All the completed questionnaires were collected by the researchers for further analysis by Statkon.

#### **3.4.2 Rationale for the sampling technique**

For the purpose of this study, the researcher decided on random sampling. In this study, the population consists of schools in the North West and Gauteng Provinces. The members of the population are homogeneous with regard to some characteristics such as gender, age, teaching experience, post status, primary/secondary schools, and so forth.

### **3.5 THE RESEARCH INSTRUMENT AND ITS DESIGN**

The design of the empirical investigation was a structured questionnaire consisting of biographical information and thirty one (31) questions. The aim of the questionnaire was to determine challenges facing the SMT in managing the performance measurement system in the North West and Gauteng Provinces. Rosnow and Rosenthal (1996) give the following advantages of using questionnaires:

- It is convenient to use.
- It is relatively economical.
- It can easily be administered to large numbers of people.
- It provides a type of “anonymity”.
- People respond more spontaneously when a questionnaire is anonymous (Rosnow & Rosenthal, 1996).

### **3.6 THE COMPOSITION OF THE QUESTIONNAIRE**

The research instrument consists of two sections, namely Sections A and B. The questionnaire consisted of items that are indicators of the subject which are the challenges facing the SMT in managing Performance Measurement.

The following is summary of the components of the research instrument.

**Section A:** This section is designed to get personal and general information of the respondent. The biographical details will function as independent variables to test the hypotheses relating to the management of performance measurement of teaching and learning. The details of respondents are presented in ten questions.

- gender
- age
- number of complete years of teaching experience
- highest academic and educational qualifications
- present post level
- type of school e.g. primary, secondary, combined, middle, special etc.
- geographical classification of school
- attendance of educators
- attendance of learners
- average age of school management team

**Section B:** This section consists of 31 questions that relate to perceptions of educators on the effectiveness of Performance Management (IQMS) of teaching and learning. Respondents had to indicate their responses on a Likert-type scale containing response categories such as strongly agree, agree, disagree, and strongly disagree. This investigation observes the extent management of Performance Measurement impacts on the implementation of IQMS.

Statement / Question: Opportunities for discussion on IQMS are allowed

|                   |   |   |   |   |   |   |                |
|-------------------|---|---|---|---|---|---|----------------|
| Strongly Disagree | 1 | 2 | 3 | 4 | 5 | 6 | Strongly Agree |
|-------------------|---|---|---|---|---|---|----------------|

If the respondent selects option 5, this would mean that the respondent believes that educators are allowed discussion on IQMS. Option 3 and 4 would indicate the moderate perception of the respondent.

### 3.7 ADMINISTRATION OF THE QUESTIONNAIRE

Two hundred and seventy questionnaires, analyzed by STATKON, were distributed by the researchers in the Project group the questionnaire for the survey in the North West Province from the Central and Bojanala West regions whilst another sample came from Gauteng Province in the District D4. Each school received 10 hand-delivered questionnaires with the aim of including a wider selection of the population. The questionnaires were then collected and presented to the Statistical Consultancy Services (STATKON) at the University of Johannesburg (UJ) for further analysis.

### 3.8 BIOGRAPHICAL DATA

The following tables, substantiated by a pie chart on the biographical data provide examples of the extent of representivity of the sample used.

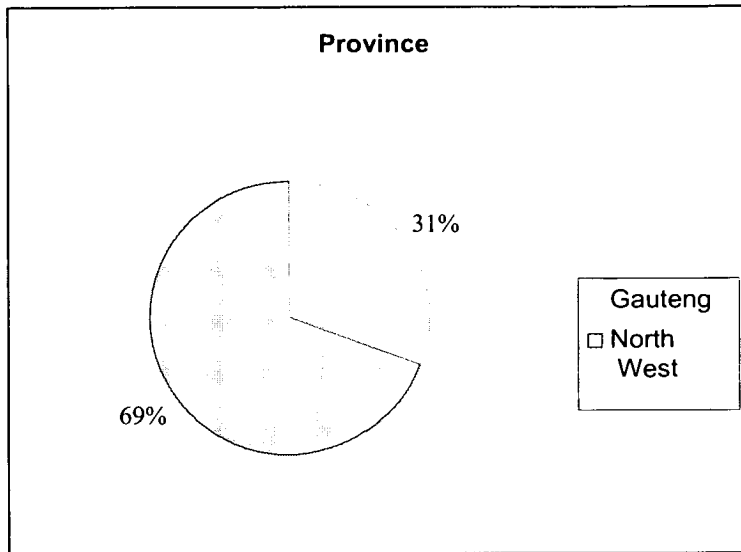
#### 3.8.1 PROVINCE

As indicated in the population and sample in the research concentrates on Gauteng and North West Provinces. The numbers of responses are as follows:

**TABLE 3.2: Province**

| <b>Respondents</b>  | <b>Frequency</b> | <b>Percentage</b> |
|---------------------|------------------|-------------------|
| Gauteng Province    | 83               | 31                |
| North West Province | 187              | 69                |

**Diagram 3.1 Provinces from which research project was conducted**



The responses were grouped indicating 69% from the North West Province and 31% from Gauteng Province. This is due to two members of the research group who researched in the North West Province. The data collected was combined and submitted for analysis by Statkon.

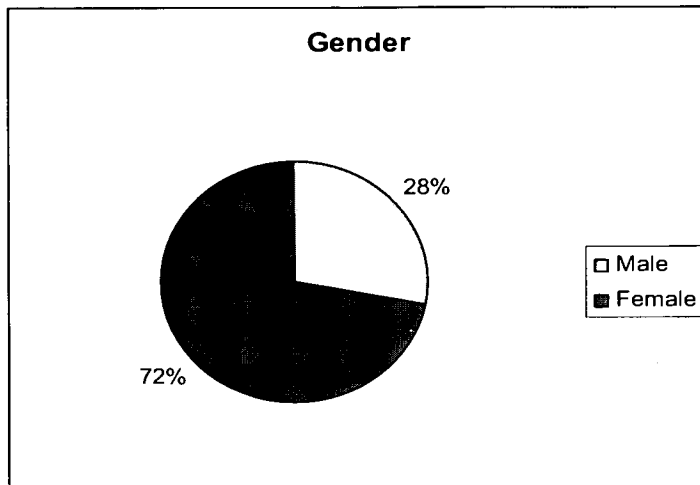
### **3.8.2 GENDER**

The following table indicates the Gender profile of respondents:

**Table 3.3: GENDER**

| <b>Respondents</b> | <b>Frequency</b> | <b>Percentage</b> |
|--------------------|------------------|-------------------|
| Male               | 74               | 28                |
| Female             | 190              | 72                |

**Diagram 3.2 Gender profiles of respondents**



Based on the table, 28% males and 72% females responded. From the data it is evident that female educators outnumbered the male respondents in this study.

Although the statistics show that there are more females in education the data also shows that very few are in the SMT. In the research areas it is traditionally expected that females must be subservient to males and this will impact on the measurement of performance.

### 3.8.3 HIGHEST ACADEMIC QUALIFICATION:

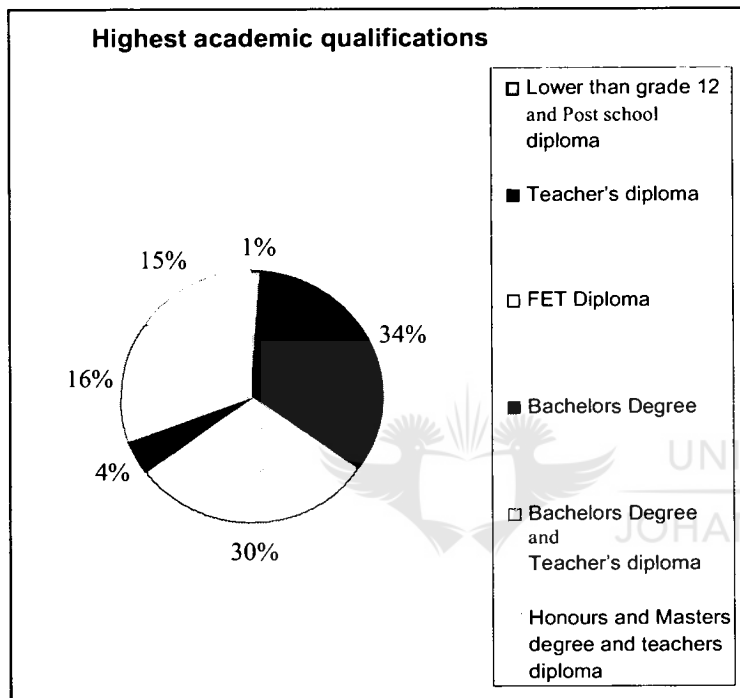
The table below indicates the Highest Academic Qualifications:

**Table 3.4: Highest Academic Qualification**

| Response                           | Frequency | Percentage |
|------------------------------------|-----------|------------|
| Grade 12 (Lower)                   | 2         | 1          |
| Post school diploma or certificate | 2         | 1          |
| Grade 12 & Teacher's Diploma       | 89        | 34         |
| Teacher's diploma & FET Diploma    | 81        | 30         |
| Bachelor's Degree                  | 12        | 4          |

|                                       |    |    |
|---------------------------------------|----|----|
| Bachelor's Degree & Teacher's diploma | 42 | 16 |
| Honours Degree & Masters Degree       | 36 | 15 |

**Diagram 3.3 Highest academic qualifications of respondents**



The responses with regard to academic qualifications indicate that the majority of educators within the system are well qualified. Only one percent of respondents are under qualified. As most of the respondents are professionally qualified, it is expected that they would be aware of the importance of performance measurement.

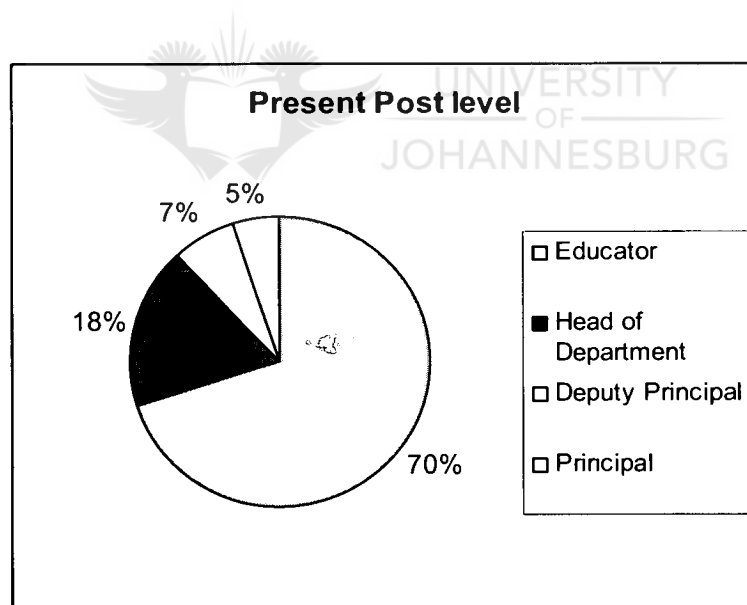
### 3.8.4. PRESENT POST LEVEL

The table below indicates the Present Post Level

**Table 3.5: Present Post Level**

| Response           | Frequency | Percentage |
|--------------------|-----------|------------|
| Educator           | 187       | 70         |
| Head of Department | 48        | 18         |
| Deputy Principal   | 19        | 7          |
| Principal          | 13        | 5          |

**Diagram 3.4 Present post levels of respondents**



The majority of respondents (70%) are at post level one and this could suggest that they are more critical of the management of PM and are working hard to ensure that the PM benefits them. Based on the given literature, the SMT which consists of the Principal, Deputy Principal and Heads of Department is responsible for identifying and addressing the challenges they face in the management of the PM. Furthermore, the SMT has to strategise how PM can be used to improve professional development of educators.



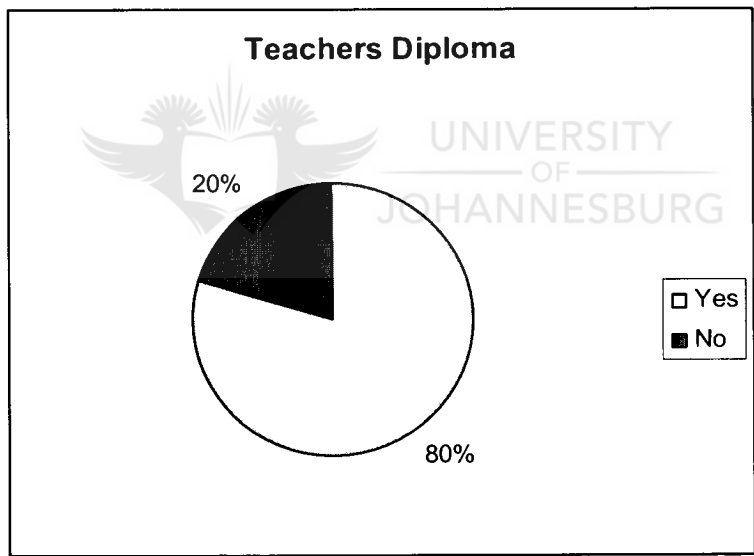
### 3.8.5 PROFESSIONAL QUALIFICATION

The table below indicates the Professional Qualifications of educators:

**Table 3.6 Professional Qualification**

| Response | Frequency | Percentage |
|----------|-----------|------------|
| Yes      | 240       | 80         |
| No       | 8         | 20         |

**Diagram 3.5 Professional qualifications of respondents**



According to the table 20% of the respondents are not professionally qualified. This percentage of professionally unqualified educators not in possession of a teaching qualification could influence their competency levels with respect to the implementation and management of PM. This becomes a challenge to the SMT as these educators are not professionally qualified to teach.

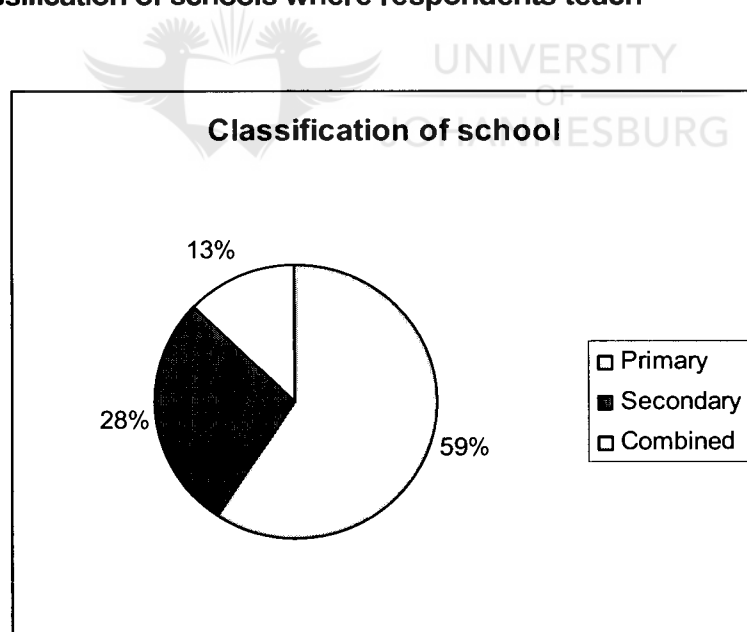
### 3.8.6 CLASSIFICATION OF SCHOOL

The table below indicates the classification of the school:

**Table 3.7 Classification of School**

| Response         | Frequency | Percentage |
|------------------|-----------|------------|
| Primary school   | 152       | 59         |
| Secondary school | 72        | 28         |
| Combined school  | 33        | 13         |

**Diagram 3.6 Classification of schools where respondents teach**



According to the response, the schools that were sampled consisted of primary schools 59%; secondary schools 28% and combined schools 13%. Taking into consideration the breakdown of schools the majority of educators and learners are in the primary school phase as would be expected. This implies that the sample is representative of the schooling population of South Africa.

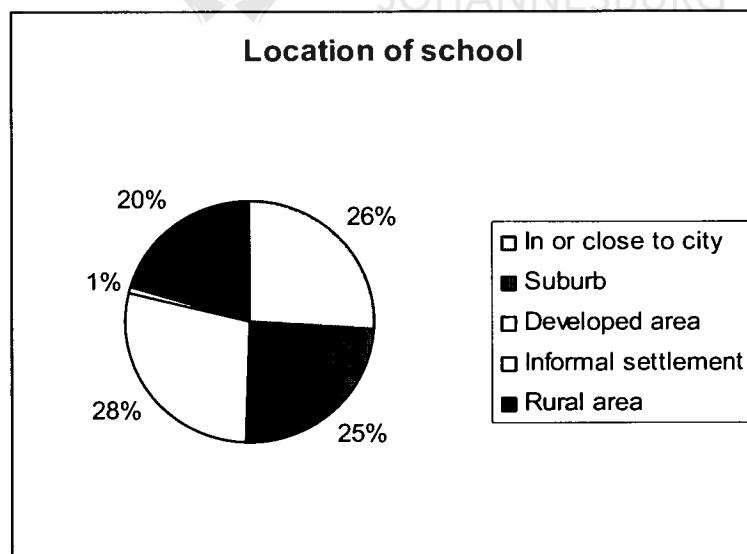
### 3.8.7 LOCATION OF SCHOOL

This table indicates the location of school:

**Table 3.8: Location of School**

| Response                  | Frequency | Percentage |
|---------------------------|-----------|------------|
| In or close to a city     | 69        | 26         |
| In a suburban area        | 65        | 25         |
| In a developed area       | 75        | 28         |
| In an informal settlement | 2         | 1          |
| In a rural area           | 54        | 20         |

**Diagram 3.7 Location of schools where respondents teach**



In terms of the table, the majority of respondents with 28% came from the developed areas where educational resources enable them to manage the PM system regarding the implementation of IQMS. Whereas, the minority from undeveloped areas implies that schools with inadequate resources have a direct impact in the management of PM.

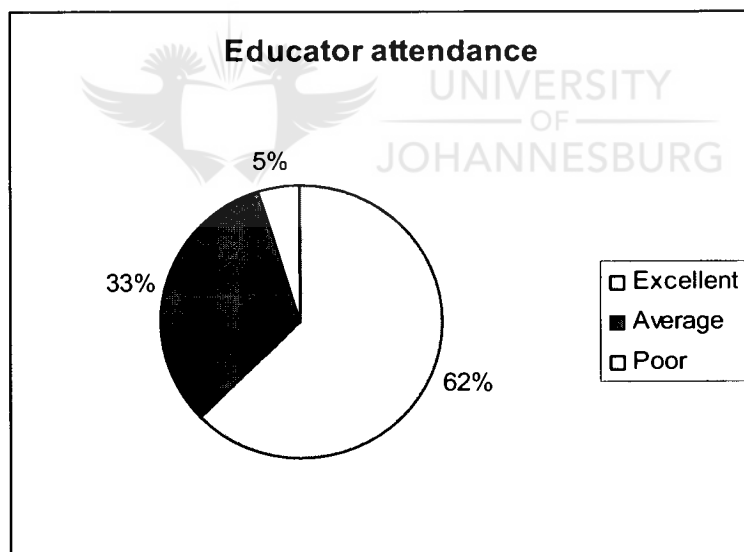
### 3.8.8 EDUCATOR ATTENDANCE

The following table indicates the attendance of educators:

**Table 3.9: Educator Attendance**

| Response  | Frequency | Percentage |
|-----------|-----------|------------|
| Excellent | 169       | 62         |
| Average   | 88        | 33         |
| Poor      | 13        | 5          |

**Diagram 3.8 Educator attendances of respondents**



Although 62% of respondents indicate that the attendance of educators is excellent, it is of concern that such a large percentage (33% average and 5% poor) of schools have average to poor attendance. This will have a direct impact on the management of PM system of schools.

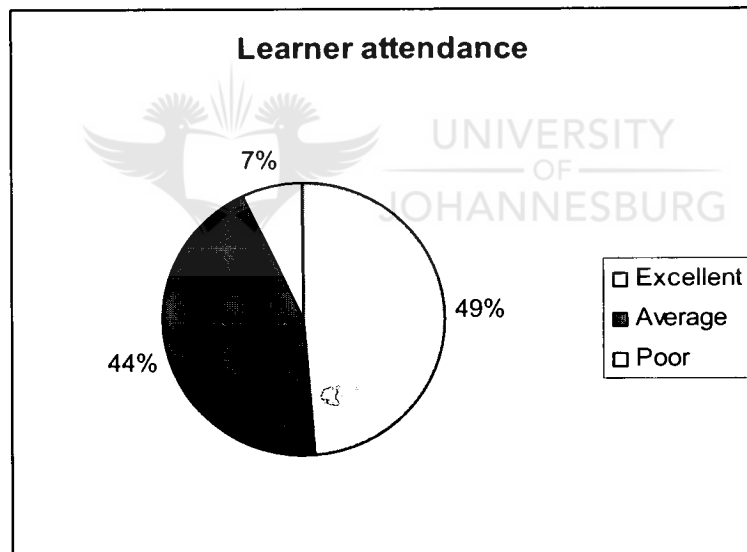
### 3.8.9 LEARNER ATTENDANCE

The following table indicates the attendance of learners:

**Table 3.10 Learner Attendance**

| Response  | Frequency | Percentage |
|-----------|-----------|------------|
| Excellent | 131       | 49         |
| Average   | 120       | 44         |
| Poor      | 19        | 7          |

**Diagram 3.9 The reflection of learner attendance**



Although 49% of respondents indicate that the attendance of learners is excellent, it is of concern that such a large percentage (44% average and 7% poor) of schools have average to poor attendance. This will have a direct impact on the management of PM system of schools.

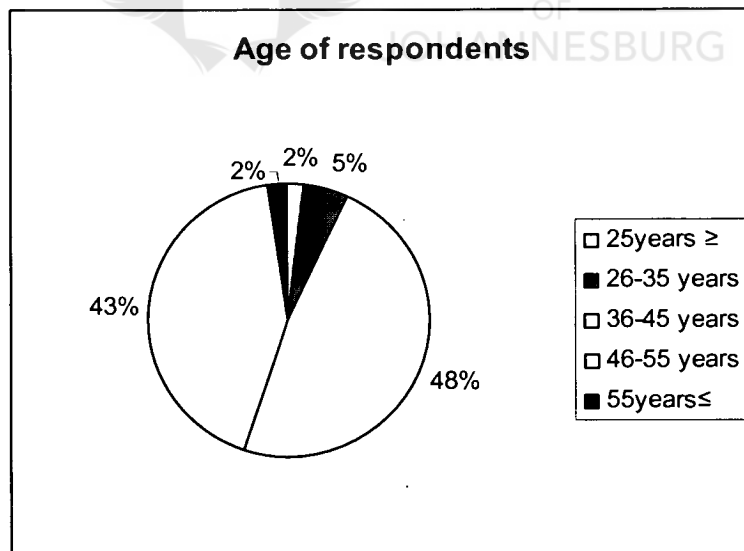
### 3.8.10: AVERAGE AGE OF YOUR SCHOOL MANAGEMENT TEAM

The table below shows the average age of your SMT:

**Table 3.11: Average Age of Your School Management Team**

| Response            | Frequency | Percent |
|---------------------|-----------|---------|
| 25 years or younger | 5         | 2       |
| 26 - 35 years       | 14        | 5.      |
| 36 - 45 years       | 126       | 48      |
| 46 - 55 years       | 112       | 43      |
| 55 years and older  | 6         | 2       |

**Diagram 3.10. Average age of your School Management Team**



According to the table, most members of the SMT are between the age of 36 and 55 as expected. This is indicative that most SMT members have the relevant experience to manage performance and assist with the development of educators.

### 3.9 SUMMARY

In this chapter the research design was discussed. A description of the methods of data collection and data analysis was presented. Relevant tables and graphs were provided and sample of respondents was also discussed, along with biographical details and the rate of responses.

In **Chapter four** the analysis and interpretation of empirical data will be discussed. The following aspects will be examined:

- reliability and validity of the research instrument
- a discussion of the various factors obtained
- a discussion of the significance of differences between the factor mean scores of the various groups for each of the factors that make up aspects of the performance instrument in relation to management of Performance Measurement



## CHAPTER FOUR

### ANALYSIS AND INTERPRETATION OF EMPIRICAL DATA

#### 4.1 INTRODUCTION

Chapter Three concentrated on an explanation of biographical data relevant to the management of PM in the implementation of IQMS. The sample as representative of Gauteng and North West Provinces was conducted to probe perceptions of respondents with regard to the management of PM and the implementation of IQMS.

Due to the limits imposed on the length of this mini-dissertation, a detailed discussion of the various statistical techniques is impossible. The discussion will be limited to the following:

- A discussion on the reliability and validity of the research instrument;
- A comparison of one of the independent pairs by stating appropriate hypotheses and interpreting the statistical tests involved;
- A discussion of the significance of differences between the factor means of the various groups for each of the factors that make up Performance Measurement;
- An analysis of the three, second order factors in order to determine which first order factors play the most important role in their composition.

It is important to ensure the reliability and validity of the structured questionnaire when determining the perceptions of educators.

#### 4.2 RELIABILITY AND VALIDITY

Before implementing the research study, it is important to establish the reliability and validity of the research instrument, to ensure that data obtained from the respondents is reliable and valid.

In general, the quality of any measure of performance or performance indicator will depend whether it is both valid and reliable (Salaman et al, 2005:324). **Reliability** is a simpler criterion. It means that similar results will be comparable if the measure is used



on the same object or person by different people and/or at different times (Salaman et al, 2005:324)

In order to establish reliability and validity of this instrument, it is necessary to clarify concepts and indicate how it relates to the research. According to (Rosnow and Rosenthal, 1996:122) reliability, broadly speaking refers to consistency or stability, for instance, whether measurements can be repeated and confirmed by further component measurements. It refers to the extent to which research findings can be replicated. Reliability reflects repeatability which implies that the researcher will use data collected from a large number of the respondents (educators and SMT) that have been involved in the management of PM. In other words, the measure can be used on the very same respondents to acquire similar data about PM whereas validity describes whether you are measuring what you intend to measure (Salaman et al, 2005:325). Therefore, a good measure needs to be straight-forward to understand and cheap to collect.

**Validity** refers to whether the measurements measure what they are supposed (or claim) to measure (Rosnow and Rosenthal, 1996:122). In other words the validity of an instrument plays a significant role in evaluating what it intends to evaluate. (Neuman, 1999:369) describes validity as the confidence placed in the analysis of the data, and the accuracy of the data representing the setting. For example, a high performance of a particular learning organization might be taken as an indicator of managerial effectiveness. However, it is possible that factors outside the control of the SMT could have a great effect on educator performance, and thus it is not a valid indicator of the effectiveness of the SMT in the management of the PM.

To assess the validity test or questionnaire means finding out the degree to which it measures what it is supposed to measure. The assessment is considered the most important criterion in instrument evaluation and, in questionnaire construction, involves accumulating evidence in three categories nl. content validity; (2) criterion validity; (3) construct validity (Rosnow and Rosenthal), 1996:403).

- Content validity means that the test or questionnaire items represent the kinds of material (or content areas) they are supposed to represent, which is usually a basic consideration in the construction phase of any

questionnaire (Rosnow and Rosenthal, 1996:130). Thus a questionnaire with good content validity covers all major aspects of the content areas that are relevant. In other words, content validity is concerned with the representation or sampling adequacy of the content such as items of the measuring instrument. In order to achieve this requirement, the questionnaire was submitted to the Statistical Consulting Services (Statkon) at the University of Johannesburg. Each item was scrutinized to an extent that it could represent the content for which it was described to measure.

- Criterion validity is the degree to which the test or questionnaire correlates with one or more outcome criteria (a variable with which our instrument should be reasonably correlated) (Rosnow and Rosenthal, 1996:131).
- Construct validity: A type of research validity that addresses psychological qualities contributing to the relation between X and Y (Rosnow and Rosenthal), 1996:403).

The construct validity of the measuring instrument was investigated by means of successive first and second order factor analytic procedures. It is a useful tool to examine the validity tests or the measurement characteristics of attitude scales (Rosnow and Rosenthal, 1996:403).

### **4.3 FACTOR ANALYSIS**

The basic aim of factor analysis is to determine the underlying factors or dimensions in a set of opinion – related questions. Borg et al., (1993:269) defines factor analysis as a correlation technique that examines a large number of items and determines whether they cluster into small number of underlying factors. The principal objective of factor analysis is to construct a small number of variables (called factors) that do a good job of conveying the information present in a large number of variables.

When doing this research, thirty one items were designed to secure information on the perceptions of respondents about the implementation of IQMS of which twenty four were relevant to management of the PM system. The construct validity of the structured

questionnaire was investigated by means of successive first and second order factor analytic procedures. The **first order procedure** involves a principal component analysis (PCA1) followed by a principle factor analysis (PFA1). These procedures were performed using the SPSS 12. 1 programme (Norusis, 2006) to identify a number of factors that may facilitate the processing of the statistics. The first order procedure resulted in 3 factors that were used as a second order procedure. This consisted of a principal component analysis (PCA2) with varimax rotation and orthogonal axes followed by a principle factor analysis (PFA2) with direct oblimin (oblique) rotation.

These procedures resulted in the thirty one items being reduced to three factors namely:

- Factor 1 consisting of 12 items that was named **Effective management of Performance Measurement (PM)** with a Cronbach-alpha-reliability coefficient of 0.887 with twelve items rejected
- Factor 2 consisting of 6 items that was dubbed **Individual competence** with a Cronbach-alpha-reliability coefficient of 0. 895 with six items rejected
- Factor 3 consisting of 6 items that was dubbed **Participative decision-making** with a Cronbach-alpha-reliability coefficient of 0. 849 with six items rejected.

The **Second Order Factor Analysis** resulted in the five (5) first order factors being reduced to three factors, as indicated below:

**TABLE 4.3.1: ITEMS ASSOCIATED WITH THE FACTOR EFFECTIVE MANAGEMENT OF PERFORMANCE MEASUREMENT**

| ITEM NO. DESCRIPTION   | MEAN | RANK ORDER |
|--|------|------------|
| SB.Q1. Opportunities for discussion for IQMS are allowed             | 4.05 | 1          |
| SB.Q2. The SMT has received sufficient training in implementing IQMS | 3.83 | 3          |
| SB.Q3. At my school peers can efficiently appraise an educator       | 3.79 | 5          |
| SB.Q4. Educators are sufficiently knowledgeable                      | 3.67 | 8          |

|   |      |    |
|---|------|----|
| about the complexities to teacher appraisal   |      |    |
| SB.Q5. At my school educators have the ability to be constructive in their criticism        | 3.57 | 10 |
| SB.Q6. At my school educators perceive the educator appraisal as fair                       | 3.63 | 9  |
| SB.Q7. Situational factors should be taken into consideration when an educator is appraised | 3.80 | 4  |
| SB.Q8. At my school educators are sensitive towards each others needs when doing appraisal  | 3.68 | 7  |
| SB.Q9. At my school educators take part in the development of performance standards         | 3.78 | 6  |
| SB.Q15. The DSG always provides sufficient support during the implementation of IQMS        | 3.26 | 12 |
| SB.Q16. The DSG always provides sufficient mentoring during the implementation of IQMS      | 3.34 | 11 |
| SB.Q28. The IQMS allows for the development of a PGP  | 3.90 | 2  |



**Table 4.3.1.1: Distribution of responses: Performance Measurement**

| Rank  | Item | 1 | %   | 2  | %   | 3   | %    | 4   | %    | 5   | %    | 6 | %   | Total |
|---|------|---|-----|----|-----|-----|------|-----|------|-----|------|---|-----|-------|
| 1   | B1   | 2 | 0.7 | 3  | 1.1 | 62  | 23   | 115 | 42.6 | 87  | 32.2 | 1 | 0.4 | 270   |
| 2   | B28  | 4 | 1.5 | 7  | 2.6 | 74  | 27.4 | 110 | 40.7 | 72  | 26.7 | 3 | 1.1 | 270   |
| 3   | B2   | 1 | 0.4 | 14 | 5.2 | 80  | 29.6 | 111 | 41.1 | 63  | 23.3 | 1 | 0.4 | 270   |
| 4   | B7   | 5 | 1.9 | 16 | 5.9 | 69  | 25.6 | 114 | 42.2 | 64  | 23.7 | 2 | 0.7 | 270   |
| 5   | B3   | 1 | 0.4 | 12 | 4.4 | 92  | 34.1 | 103 | 38.1 | 61  | 22.6 | 4 | 0.4 | 270   |
| 6   | B9   | 2 | 0.7 | 14 | 5.2 | 85  | 31.5 | 112 | 41.5 | 57  | 21.1 | 0 | 0   | 270   |
| 7   | B8   | 2 | 0.7 | 15 | 5.6 | 92  | 34.1 | 119 | 44.1 | 41  | 15.2 | 1 | 0.4 | 270   |
| 8   | B4   | 1 | 0.4 | 14 | 5.2 | 100 | 37   | 113 | 41.9 | 40  | 14.8 | 2 | 0.7 | 270   |
| 9   | B6   | 5 | 1.9 | 10 | 3.7 | 96  | 35.6 | 125 | 46.3 | 32  | 11.9 | 2 | 0.7 | 270   |
| 10  | B5   | 4 | 1.5 | 16 | 5.9 | 103 | 38.1 | 115 | 42.6 | 30  | 11.1 | 2 | 0.7 | 270   |
| 11  | B11  | 3 | 1.1 | 3  | 1.1 | 43  | 15.9 | 114 | 42.2 | 106 | 39.3 | 1 | 0.4 | 270   |
| 12  | B12  | 6 | 2.2 | 12 | 4.4 | 50  | 18.5 | 101 | 37.4 | 100 | 37   | 1 | 0.4 | 270   |
| <b>Total average responses of disagree to strongly disagree = 34.5%</b> |      |   |     |    |     |     |      |     |      |     |      |   |     |       |

The following table consists of items associated with factor (2) Individual competence and the distribution of responses.

**TABLE 4.3.2: ITEMS ASSOCIATED WITH THE FACTOR INDIVIDUAL COMPETENCE**

| ITEM NO. DESCRIPTION  | MEAN | RANK ORDER |
|---|------|------------|
| SB.Q19. At my school, the SDT is democratically elected by the staff                          | 4.31 | 1          |
| SB.Q20. At my school, the SDT ensures that all staff members are sufficiently trained on IQMS | 4.00 | 2          |
| SB.Q21. At my school, the SIP is developed through collaboration with educators               | 3.92 | 3          |
| SB.Q25. The SDT tracks progress with regards to the implementation of IQMS                    | 3.87 | 4          |
| SB.Q26. The SDT provides mentoring to the educator being evaluated                            | 3.70 | 6          |
| SB.Q27. The SDT provides support to the educator being evaluated                              | 3.72 | 5          |

**Table 4.3.2.1: Distribution of responses: Individual competence**

| Rank   | Item | 1 | %   | 2  | %   | 3  | %    | 4  | %    | 5   | %    | 6 | %   | Total |
|--|------|---|-----|----|-----|----|------|----|------|-----|------|---|-----|-------|
| 1  | B19  | 2 | 0.7 | 11 | 4.1 | 31 | 11.5 | 82 | 30.4 | 142 | 52.6 | 2 | 0.7 | 270   |
| 2  | B20  | 1 | 0.4 | 14 | 5.2 | 66 | 24.4 | 59 | 33   | 98  | 36.3 | 2 | 0.7 | 270   |
| 3  | B21  | 3 | 1.1 | 15 | 5.6 | 68 | 25.2 | 95 | 35.2 | 86  | 31.9 | 2 | 0.7 | 270   |
| 4  | B25  | 2 | 0.7 | 10 | 3.7 | 81 | 30   | 10 | 37   | 72  | 26.7 | 5 | 1.9 | 270   |
| 5  | B27  | 5 | 1.9 | 13 | 4.8 | 85 | 31.5 | 10 | 40.4 | 55  | 20.4 | 3 | 1.1 | 270   |
| 6  | B26  | 5 | 1.9 | 12 | 4.4 | 97 | 35.9 | 99 | 36.7 | 55  | 20.4 | 2 | 0.7 | 270   |
| <b>Total average responses of disagree to strongly disagree = 32.16%</b> |      |   |     |    |     |    |      |    |      |     |      |   |     |       |

The previous table 4.3.1 indicated items associated with the factor Effective management of performance measurement and the distribution of responses.

The following table consists of items associated with factor (3) Participative decision-making and the distribution of responses.

**TABLE 4.3.3 ITEMS ASSOCIATED WITH THE FACTOR PARTICIPATIVE DECISION-MAKING**

| ITEM NO. DESCRIPTION  | MEAN | RANK ORDER |
|---|------|------------|
| SB.Q22. At my school, PGP is developed by the individual educator   | 3.94 | 6          |
| SB.Q23. The principal of a school should ensure that every educator embarks on a process of self-evaluation | 4.30 | 1          |
| SB.Q24. At my school the principal ensures that every educator understands how the IQMS system works        | 4.26 | 2          |
| SB.Q29. At my school, the principal demonstrates a commitment towards the effective implementation of IQMS  | 4.17 | 3          |
| SB.Q30. At my school, the principal monitors the management plans for the IQMS                              | 4.17 | 4          |
| SB.Q31. At my school, the principal ensures that self-evaluation is done in terms of the WSE policy         | 4.14 | 5          |

**Table 4.3.3.1: Distribution of responses: Participative decision-making**

| Rank  | Item | 1 | %   | 2  | %   | 3  | %    | 4   | %    | 5   | %    | 6 | %   | Total |
|---|------|---|-----|----|-----|----|------|-----|------|-----|------|---|-----|-------|
| 1   | B23  | 2 | 0.7 | 5  | 1.9 | 29 | 10.7 | 106 | 39.3 | 127 | 47   | 1 | 0.4 | 270   |
| 2   | B24  | 1 | 0.4 | 7  | 2.6 | 35 | 13   | 105 | 38.9 | 120 | 44.4 | 2 | 0.7 | 270   |
| 3   | B29  | 1 | 0.4 | 7  | 2.6 | 49 | 18.1 | 103 | 38.1 | 109 | 40.4 | 1 | 0.4 | 270   |
| 4   | B30  | 2 | 0.7 | 7  | 2.6 | 42 | 15.6 | 111 | 41.1 | 106 | 39.3 | 2 | 0.7 | 270   |
| 5   | B31  | 1 | 0.4 | 5  | 1.9 | 55 | 20.4 | 105 | 38.9 | 104 | 38.5 | 0 | 0   | 270   |
| 6   | B22  | 5 | 1.9 | 17 | 6.3 | 54 | 20   | 106 | 39.3 | 86  | 31.9 | 2 | 0.7 | 270   |
| <b>Total average response of disagree to strongly disagree = 20 %</b> |      |   |     |    |     |    |      |     |      |     |      |   |     |       |

The previous table 4.3.3.1 indicated items associated a total average response of disagree to strongly disagree.

The following is a discussion of specific questions pertaining to the reliability of the second order factors.

#### **4.4 DISCUSSION OF SPECIFIC QUESTIONS PERTAINING TO THE RELIABILITY OF THE SECOND ORDER FACTORS:**

##### **4.4.1 EFFECTIVE MANAGEMENT OF PERFORMANCE MEASUREMENT**

- **Question B1. Opportunities for discussion about IQMS are allowed**

The high mean score of **SB.Q1 = 4.05**, in relation to Performance Measurement, indicates that the majority of the respondents are of the opinion that opportunities for discussion on PM are allowed in their schools. This is an indication of the participative management style legislated on the democratic principles of IQMS taking place. This high rank order indicates that participants are satisfied that they are allowed discussion with the management and implementation of the PM system. However, the distribution tables 4.3.1.1 indicate that 24.8 % of the respondents do not agree that educators are allowed discussion on their management and individual performance in the PM system. This percentage represents a significant number of respondents that are dissatisfied with the aspect of PM and its management and implementation. Although the high mean score recorded, thus suggest that participation in the management of the PM is an important aspect for its successful implementation, it is of concern that too great a percentage of schools allow for discussion and this a reason for concern.

- **Question B.28. The IQMS allows for the personal development of a Personal Growth Plan**

In terms of the mean score of **B.28 = 3.90**, 68,5% of respondents implies that IQMS allows for the development of a Personal Growth Plan (PGP) which the respondents use to identify development needs and participate in their own developmental plan. This is crucial in appraisal system and in the management of PM. According to the respondents

the implementation of IQMS does not allow for the development of a PGP and therefore they do not buy into the management of performance.

- **Question B.2. The SMT has received sufficient training in implementing IQMS**

In terms of the mean score of **B.2 = 3.83** the respondents are of the opinion that the SMT has received sufficient training in implementing IQMS. The new appraisal system IQMS that is inclusive of various Labour representatives, could be an interpretation that the SMT in schools together with the elected SDT and DSG are effectively implementing the IQMS as an appraisal and development system. However, more than one third of respondents expressed feelings of dissatisfaction. This could impact negatively on the management of PM.

Having discussed a sample of the items relating to **EFFECTIVE MANAGEMENT OF PERFORMANCE MEASUREMENT**, items relating to individual competence will now be discussed.



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## **FACTOR 2: INDIVIDUAL COMPETENCE**

- **Question B. 19. The SDTs in their schools are democratically elected by the staff**

The mean score of **B.19 = 4.31**, indicates that respondents are of the opinion that the SDTs were democratically elected by the staff. Only a small percentage of respondents who indicated that they disagree to strongly disagree (16.3%) suggest that the SDTs in their schools are democratically elected. Thus most educators would support the process of performance management.

- **Question B.20. The SDT ensures that all staff members are sufficiently trained on IQMS**

The mean score of **B.20 = 4.01**, indicates that the respondents are of the opinion that the SDT ensures that all staff members are sufficiently trained on IQMS. However, the



numbers of respondents who disagree to strongly disagree (30%) is significant. This indicates a large group of respondents are of the opinion that the SDT does not ensure that all the staff is sufficiently trained on PM. This further suggests that the negative respondents could experience feelings of dissonance and distrust and this could pose a challenge to the management of PM by the SMT.

- **Question B. 21. The SIP is developed in collaboration with all staff members**

The mean score of **B.21 = 3.92**, indicates that most of the respondents are of the opinion that the SIP is developed in collaboration with all staff members. In order for the school to measure its own progress, there needs to be a common SIP, developed by the SDT, to ensure that all educator needs are catered for. This allows for commonality and ensures continuity amongst stakeholders within a school applying the IQMS as a developmental and appraisal system. The 31.9% respondents who disagree to strongly disagree suggest that the procedures of a consultative or collaborative approach to draw the school SIP are not done in some schools. This could negatively impact on the managing the PM.

Now that the researcher discussed second factor **INDIVIDUAL COMPETENCE**, the focus will shift to the third aspect of Participative decision-making.

### **FACTOR 3: PARTICIPATIVE DECISION-MAKING**

The following are the examples of the responses of the respondents.

- **Question B.23. The principal of a school should ensure that every educator embarks on a process of self-evaluation**

The mean score of **B.23 = 4.30**, indicates that the majority of respondents are of the opinion that the principal of a school should ensure that every educator embarks on a process of self-evaluation. The role of the principal of a school is to ensure that through the management of PM is a process of ongoing self-evaluation takes place. The researcher thus deduces that, if self-evaluation is done properly, an educator would be able to develop a PGP which would support the management of PM

- **Question B.24. The principal at their school ensures that every educator understand how IQMS works**

The mean score of **B.24 = 4.26**, indicates that the respondents are of the opinion that the principal at their school ensures that every educator understands how IQMS system works. Although the role of the principal in ensuring the efficient management of PM through the SDT and DSG is evident in the scores and responses of the educators, this could be done through ensuring that every educator is properly trained on how IQMS works.

- **Question B.30. The principal demonstrates a commitment towards the effective implementation of the IQMS and the principal monitors the management plans for the IQMS**

The mean score of **B.30 = 4.17**, indicates that the respondents are of the opinion that the principal demonstrates a commitment towards the effective implementation of the IQMS and the principal monitors the management plans for PM. There is a clear indication of trust amongst the educators for the competence of their principals which is proved by the interactive mean scores obtained. However, the respondents who disagree with the statement suggest their dissatisfaction with regard to the role of the principal with the management and implementation of IQMS. The researcher thus deduces that, through the effective implementation of IQMS, the principal will alleviate possible stumbling blocks or challenges in the management of PM. Those on the negative end may eventually come on board when the principal continues to demonstrate a commitment towards the effective implementation and monitoring of the management plans for PM.

#### **4.5 HYPOTHESIS TESTING**

A statistical hypothesis usually postulates the opposite of what the researcher predict or expects. In this form it is known as a null hypothesis and it is usually represented by the symbol **H<sub>0</sub>**. If the researcher thus expects that there will be a statistically significant difference between the mean scores of male and female educators with respect to the aspect of participation during the management of the PM then the hypothesis will be

stated in the form of a null hypothesis. It is the null hypothesis that is tested using statistical techniques.

The null hypothesis will therefore then read:

- **H<sub>0</sub>** – There is no significant statistical difference between the mean scores of the male and female educators with respect to participation during the implementation of the IQMS.
- **H<sub>a</sub>** – There is a significant statistical difference between the mean scores of male and female educators with respect to participation during the implementation of the IQMS

Should it be found that there is a statistically significant difference between the mean scores of male and female educators with respect to participation during the management of the IQMS, then the null hypothesis (**H<sub>0</sub>**) is rejected and the alternative hypothesis (**H<sub>a</sub>**) is accepted.

Due to the restrictions placed on the length of a mini-dissertation only two examples of the independent groups will be discussed in detail.

#### **4. 5.1 Comparison of independent groups**

At the multivariate level two independent groups can be compared for possible statistical differences in their mean scores using the T-test for the Equality of Means. This implies that the vector means of the two independent groups are compared in respect to of the three factors considered together. Should a statistically significant difference be found at the multivariate level then Levene's test for the Equality of Variances is applied at the univariate level, taking each of the variances separately.

The researcher was of the opinion that the responses of SMT –members (including the principal) as opposed to that of educators might be significantly different in relation to the three factors, thus the option of post-level as independent group.

**TABLE 4.4.1 SIGNIFICANCE OF DIFFERENCE BETWEEN SMT-MEMBERS AND EDUCATORS WITH REGARD TO POST AS INDEPENDENT VARIABLE REGARDING THE THREE FACTORS TOGETHER**

| FACTOR                           | GROUP           | FACTOR MEAN  | T-Test for Equality of Means (p-value) | LEVENE'S Test for the Equality of Variance (p-value) |
|----------------------------------|-----------------|--------------|--|--|
| 1 Performance Measurement        | Educator<br>SMT | 3.71<br>3.62 | 0.260                                  |  |
| 2 Individual competence          | Educator<br>SMT | 3.93<br>3.88 | 0.601                                  |  |
| 3 Participative decision- making | Educator<br>SMT | 4.14<br>4.19 | 0.618                                  |  |
| Factors together                 | Educator<br>SMT | 4.02<br>3.98 | 0.618                                  | 0.990  |

\*\* Statistically significant at the 1% level ( $p < 0, 01$ )

\* Statistically significant at the 5% level ( $p > 0, 01$  but  $< 0, 05$ )

N (educators) = 173

N (SMT) = 77

**Table 4.4.1** indicates that there is no statistically significant difference between the vector mean scores of educators and SMT-members at the multivariate level in respect of all three factors considered together ( $p=0,990$ ). The null hypothesis ( $H_0$ ) is thus accepted.

|    |  |          |
|----|--|----------|
| Ho | There is no statistically significant difference between the vector mean scores of educators and SMT-members in respect of the three factors considered together | Accepted |
| Ha | There is a statistically significant difference between the  |          |

|  |   |  |
|--|---|--|
|  | vector mean scores of educators and SMT-members in respect of the three factors considered together |  |
|--|---|--|

At the univariate level educators and SMT-members does not differ statistically significantly from one another in respect of all three factors considered separately. Ho1, Ho2 and Ho3 (hypothesis in relation to each of the factors separately) are thus accepted.

|     |   |          |
|-----|---|----------|
| Ho1 | There is no statistically significant difference between the vector mean scores of educators and SMT-members in respect of Factor 1 | Accepted |
| Ho2 | There is no statistically significant difference between the vector mean scores of educators and SMT-members in respect of Factor 2 |          |
| Ho1 | There is no statistically significant difference between the vector mean scores of educators and SMT-members in respect of Factor 3 |          |
| Ha1 | There is a statistically significant difference between the vector mean scores of educators and SMT-members in respect of Factor 1  |          |
| Ha2 | There is a statistically significant difference between the vector mean scores of educators and SMT-members in respect of Factor 2  |          |
| Ha3 | There is a statistically significant difference between the vector mean scores of educators and SMT-members in respect of Factor 3  |          |

SMT-members perceive themselves to be duty bound to effectively manage the Performance measurement system whilst educators on Post Level one seem very reluctant to comply in managing and implementing the PM as they believe that they are not duty bound to manage the new system.

**TABLE 4.4.2 SIGNIFICANCE OF DIFFERENCES BETWEEN EDUCATORS WITH REGARD TO QUALIFICATION AS INDEPENDENT VARIABLE REGARDING THE THREE FACTORS TOGETHER**

| <b>FACTOR</b>  | <b>GROUP</b>  | <b>FACTOR MEAN</b> | <b>T-Test for Equality of Means (p-value)</b> | <b>LEVENE'S Test for the Equality of Variance (p-value)</b> |
|--|---|--------------------|---|---|
| 1<br>Performance Measurement                               | Professional qualification less Degree<br>Bachelors degree and higher | 3.71<br>3.66       | 0.474   |   |
| 2 Individual Competence                                    | Professional qualification less degree<br>Bachelors degree and higher | 3.99<br>3.79       | 0.204   |   |
| 3 Participative Decision-making                            | Professional qualification less degree<br>Bachelors degree and higher | 4.18<br>4.13       | 0.050 *                                       |   |
| 4 Factors together constitute Performance Measurement (PM) | Professional qualification less degree<br>Bachelors degree and higher | 4.06<br>3.90       | 0.087   | 0.363   |

\*\* Statistically significant at the 1% level ( $p < 0,01$ )

\* Statistically significant at the 5% level ( $p > 0,01$  but  $\leq 0,05$ )

n (educators) = 173

n (SMT) = 77

**Table 4.4.2** indicates that there is no statistically significant difference between the vector mean scores of educators at the multivariate level in respect of all three factors considered together ( $p = 0.363$ ) The null hypothesis ( $H_0$ ) is thus accepted

|    |  |          |
|----|--|----------|
| Ho | There is no statistically significant difference between the vector mean scores of educators and SMT-members in respect of the three factors considered together | Accepted |
| Ha | There is a statistically significant difference between the vector mean scores of educators and SMT-members in respect of the three factors considered together  |          |

At the univariate level educators do not differ statistically significantly from one another in respect of factors one and two. However there is a statistically significant difference at the 5% level ( $p = 0.050$ ) in relation to factor 3.  $H_{03}$  (hypothesis in relation to the factor considered separately) are thus rejected in favour of the alternative hypothesis ( $H_{a3}$ ).

|     |   |          |
|-----|---|----------|
| Ho1 | There is no statistically significant difference between the vector mean scores of educators and SMT-members in respect of Factor 1 | Accepted |
| Ho2 | There is no statistically significant difference between the vector mean scores of educators and SMT-members in respect of Factor 2 | Accepted |
| Ho3 | There is no statistically significant difference between the vector mean scores of educators and SMT-members in respect of Factor 3 |          |
| Ha1 | There is a statistically significant difference between the vector mean scores of educators and SMT-members in respect of Factor 1  |          |
| Ha2 | There is a statistically significant difference between the   |          |

|     |  |          |
|-----|--|----------|
|     | vector mean scores of educators and SMT-members in respect of Factor 2   |          |
| Ha3 | There is a statistically significant difference between the vector mean scores of educators and SMT-members in respect of Factor 3 | Accepted |

Educators with degrees feel very competent to manage and implement the PM system whilst educators without academic qualifications feel incompetent to comply in terms of managing the PM system.

#### 4.6. SUMMARY

In this chapter an analysis and interpretation of the empirical data related to the questionnaire was undertaken. The construct validity of the research was investigated by means of a first-order factor analysis, followed by a second order factor analysis. The thirty one (31) items of section B were reduced to three factors namely:

- **Effective management of Performance Measurement** consisting of twelve items with a Cronbach Alpha-coefficient of 0.887 with twelve items rejected.
- **Individual competence** consisting of six items with a Cronbach Alpha-reliability coefficient of 0.895 with six items rejected.
- **Participative decision-making** consisting of six items with a Cronbach Alpha-reliability coefficient of 0.849 with six items rejected.

From this research conducted, Hypothesis testing was done to determine the mean scores of the independent groups in respect of the three factors making up management of Performance Measurement.

In chapter 5 a summary of the research will be undertaken. Important findings and recommendations will be made.





## CHAPTER 5

### SUMMARY, FINDINGS AND RECOMMENDATIONS

#### 5.1 INTRODUCTION

In **Chapter four** an analysis and interpretation of the empirical data related to the questionnaire was undertaken. The construct validity of the research was investigated by means of a first-order factor analysis, followed by a second-order factor analysis.

Chapter five will present an overview of the study, with reference to the background, problem statement, aims as well as the method of research and the results. Important findings and recommendations will be discussed.

Prior to 1994 there were 19 different systems of school supervision that worked as panels of inspectors who were not all specialists in any particular field (Department of Education, 2000a). The system of evaluation was not system wide, not organised and not professional. The National Policy on Whole School Evaluation was designed to ensure that school evaluation is carried out to an agreed national model. It sets out the legal basis for school evaluation, its purposes, what is evaluated and who can carry out these functions. The purpose of the policy is firstly to improve the overall quality of education in South African schools (Department of Education, 2000b). Secondly, the policy offers guidelines, tools for evaluation, and built-in mechanisms to report findings and provide feedback to the school and other stakeholders. As process, whole school evaluation is meant to be supportive and developmental rather than punitive and judgmental.

There has been a move towards shared decision-making, where the South African government has initiated programmes of curriculum reform of which one is the Integrated Quality Management System (IQMS). The IQMS is informed by Schedule I of the Employment of Educators Act, No 76 of 1998. IQMS is defined in the Education Labour Relations Council (ELRC) Collective Agreement No 8 of 2003 as an Integrated Quality Management System that consists of three components which are supposed to complement one another, "without duplication of structures and procedures" (ELRC, 2003, 4). The main objective of the Integrated Quality Management System (IQMS) is to ensure quality public education for all and to constantly improve the quality of learning

and teaching. Both Performance Measurement and Developmental Appraisal have to be completed in one school year and are linked to Whole School Development. The focus in this research study was the need for effective management of performance measurement, individual competence and effective participative decision-making in order to overcome challenges faced by the SMT in managing PM.

## **5.2 SUMMARY**

This research deals with identifying the challenges faced by the SMT in the management of Performance Measurement (IQMS) in the implementation of IQMS. **Chapter One** provided a general orientation to the study, setting out the general and specific aims of the research as well as the methodology to be implemented.

**Chapter Two** focussed on a literature study and the theoretical framework within which the research is based and about the impact of TQM on school improvement, school improvement, performance appraisals, educator empowerment, benchmarking and motivations. This included the acquisition of organizational structures such as the SMT, SDT and DSG to ensure the successful management of PM. For example, the national policy on education, the national curriculum, and the whole school development, assessment and appraisal system require new mindsets (Moloi, K.C. 2002: 26-27). It is important for an educator to have the ability to interpret and understand these legislative documents. The study further shows that it is located within the theories of TQM and organizational theories.

**Chapter three** outlined the research methodology and the design of the research instrument which focused on the following issues namely,

- **Effective management of Performance Measurement**
- **Individual competence**
- **Participative decision-making**

The methodology used to collect the data and the structured questionnaire as a research instrument was discussed. The empirical investigation was also discussed using a

sample of the biographical details with relevant tables and substantiating pie graphs as well as the administration of the questionnaire

**Chapter four** outlined an analysis and interpretation of a selected sample of empirical data. Aspects of reliability and validity of the structured questionnaire and the various factors as a research instrument used in this research were briefly discussed. The thirty one (31) items were subjected to two successive factor analytic procedures that reduced the thirty one (31) items to three factors. These factors were named **effective management of performance measurement, individual competence and effective participative decision-making** and their impact on educator performance. These three items were selected for discussion according to ranking order of each factor and how they impact on the PM system.

### **5.3 SUMMARY OF IMPORTANT FINDINGS**

#### **5.3.1 Findings from literature in respect of individual competence and participative decision-making as aspects of Performance Measurement**

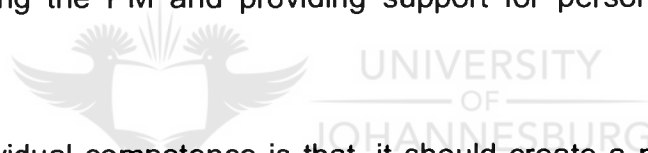
#### **INDIVIDUAL COMPETENCE AND PARTICIPATIVE DECISION-MAKING**

- **Finding 1: School Improvement**

School Improvement is a systematic, sustained effort aimed at a change in learning conditions and other related internal conditions, with the ultimate aim of accomplishing educational goals more effectively (ELRC, 2003:12). Furthermore, School Improvement is about developing strategies for educational change that strengthens the school's organisation, as well as implementing curriculum reforms (ELRC, 2003:12). The School Improvement Plan (SIP) (ELRC, 2003:12) is an important document, which enables the school to measure its own progress through the process of ongoing self-evaluation. This must happen continuously, especially in the years in between the cyclical external WSE (ELRC, 2003:12). The SIP is developed by the SDT and informed by the educator's PGP (ELRC, 2003:11) which may include challenges such as resources, incentives, planning, monitoring, evaluation and other contextual factors. It is submitted to the District office

through the process of negotiation. This plan gives an opportunity to address recommendations made to the school (ELRC, 2003:12).

In other words, whilst the SMT manages and evaluates educator performance, good performance should be celebrated and rewarded. Educators should be urged to strive for professional improvement, keeping up with new developments in education and specific areas of specialization, particularly take note of legislative changes that directly affect one's work. The national policy on education, the national statements and the whole school development, assessment and appraisal system require new mindsets (Moloi, 2002: 26-27). It is important for the SMT to play a role in the interpretation and understanding of these legislative documents. Bisschoff (2001: 152) states that in their capacity as managers of schools, principals should be supported and guided by Departmental officials with respect to matters such as the interpretation, implementation and execution of departmental instructions. In other words, the SMT faces the challenge of developing appropriate policies, strategies and effective structures to address the challenges in managing the PM and providing support for personal and professional growth of educators.



The real value of individual competence is that, it should create a platform of individual contribution and skill. For example, the election of the SDT in schools revealed that 16, 3% respondents rejected such a process of elections. It revealed that the elections were undemocratic and unfair. The research study further showed educators were dissatisfied because they were left out by the SMT and their individual competence was not needed in the election of the SDT. Thus, such a percentage revealed concern that the SMT needed to consider in order to manage PM effectively.

- **Finding 2: Performance Measurement**

Performance Measurement plays a potential role of transforming learning institutions but only if the system yields professional development opportunities. This formal process can succeed in improving performance only if the individuality of each educator is recognised as an important element. Therefore, management of PM and review can give an account of performance that is a prelude to development. Performance review systems should be recommended to address the insufficient care in implementation strategies, particularly

with educators not well trained or supported sufficiently to manage the Performance Measurement system. In order to move swiftly with this system, the management should recognise the impediments in implementing and managing PM and attempt to resolve issues internally to achieve an agreed system which balances support and accountability. The Department of Education should be commended in its efforts to support educators to achieve a satisfactory salary progression and grade progression through performance measurement as it has striven to move forward by balancing the strong accountability element of previous inspection regimes with a more positive determination to provide professional support to educators by implementing a Performance Measurement system.

### 5.3.2 Findings from the empirical investigation

- **Finding 3**

In this research study thirty one (31) items were designed to secure information on the perceptions of educators at various post levels in order to determine the management of PM in the implementation of IQMS at schools. The construct validity of the questionnaire was investigated by means of successive first and second order factor analytic procedures.

These procedures resulted in the thirty one (31) being reduced to three factors namely:

- **Effective management of Performance Measurement** consisting of twelve items with a Cronbach Alpha-reliability coefficient of 0.887 with twelve items rejected.
- **Individual competence** consisting of six items with a Cronbach Alpha-reliability coefficient of 0.895) with six items rejected.
- **Participative decision-making** consisting of six items with a Cronbach Alpha-reliability coefficient of 0.849 with six items rejected.

The factor analysis differed substantially from the theoretical analysis. All the items grouped, to form the main important three factors resulted in high mean scores indicating that respondents are indecisive whether they partially agree or disagree.

Therefore, the implication is that these three factors, will impact on the management of PM in schools, namely:

- **Effective management of Performance Measurement**
- **Individual competence**
- **Participative decision-making**

Based on the research study conducted, it was found out that individual competence and participative decision-making at all levels, are keys to effective management of the PM system in schools.

#### **5.4 RECOMMENDATIONS**

The main aim of this research study was an investigation into challenges faced by the SMT in the management of PM. In order to realise this aim, a literature survey was undertaken. This served as the foundation upon which the empirical research will be amalgamated by the following recommendations based on the aspects of PM namely; Individual competence and Participative decision-making

- **The SMT must be trained in effective implementation of Performance Measurement**

The above key elements (individual competence and participative decision-making) play a role in the management and implementation of a new Performance Management system (IQMS) and can impact on school improvement and educator performance. Once these elements have been implemented, the SMT can establish a baseline data and information to measure educator performance that could later lead to improvement and professional development. Furthermore, assistance should be given to educators to identify their objectives and create a school development plan for improvement in their performance and development

The leadership role of the SMT depends on their ability to lead and inspire educators to manage performance effectively. Training strategies such as Education support and Management programs for effective management of PM should provide for the

acquisition of skills and new knowledge. The SMT must provide educators with ample time to scrutinize the material on the implementation of IQMS and be allowed to suggest strategies to manage PM. Furthermore, assistance should be given to educators to identify their objectives and create a school development plan for improvement in their teaching and development.

The education authorities together with policy-makers must implement a consultative approach and strategy to involve educators in the management of PM. Their inputs with regard, trends and in class experience are vital to implement or formulate policy and practices that will identify and overcome the challenges faced by the SMT in managing the PM system. A sound working relationship may be one where performance shortcomings, personal problems that affect work performance, or career progression are addressed and solutions sought to inspire the staff members to achieve the objectives of the school and ensuring professional development.

- **The SMT should create more open and more participative structures**

Educators at all levels must be allowed to participate openly and freely in discussions for the creation and development of new effective structures of IQMS. The SMT must ensure that an ethos that generates committed educators is created. This will enhance the flow of information and create an atmosphere where all members experience a sense of ownership of PM. In order to ensure success and effective management of PM, it is important for the SMT to develop appropriate knowledge and skills about democracy to manage PM. In the normal working school, empowerment plays a role in producing a sense of ownership and this organizational state should be encouraged through the effective participation of all educators in curriculum and instructional decision-making regarding the management of PM. The SMT must ensure that responsibility is shared by allowing all staff members to participate in managing and solving together problems experienced during the implementation of PM.

## **5.5 TOPICS FOR FURTHER RESEARCH**



From the analysis of data undertaken in this research study, it appears that there is a need for further research on strategies to be adopted by the SMT to overcome the challenges in the management of the PM. It will be imperative that further research is conducted around aspects namely:

- Educator empowerment
- Continuous improvement and Professional development
- Educator burnout
- Leadership and management
- Networking, partnership and communication
- Participatory management

While addressing the challenges and strategies facing the SMT in the management of Performance Measurement in the implementation of IQMS at schools, the educators can be led to affirm their commitment to overcoming the stumbling blocks in managing PM effectively.



## **5.6 CONCLUSION**

In addressing the challenges that the SMT faces in the management of Performance Measurement, aspects of Performance Measurement (individual competence and participative decision-making) have been recommended to ensure the success and effective implementation and management of PM. The fact that the principal together with the SMT is responsible for the effective management of PM raises concern when all staff members are not allowed opportunities for discussion about IQMS. More educator participation, training and professional development of individual educators, promotes a common vision, quality, improved performance and a commitment towards the effective management of PM and collective strategies on how to overcome challenges facing the SMT in managing PM effectively.

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## **THE QUESTIONNAIRE**

Please DO NOT write your name or the name of your school on any part of this questionnaire.

This questionnaire consists of two sections. Section A refers to background and general information of the respondent. Section B consists of questions that relate to You are requested to respond to ALL questions in both sections.

### SECTION A: PERSONAL AND GENERAL INFORMATION

The information obtained in this section will be treated as confidential and will only be used for comparative purposes.

Please circle the applicable code or fill in the number where necessary.

|   |                                  |
|---|----------------------------------|
| EXAMPLE FOR COMPLETING SECTION A            | <input checked="" type="radio"/> |
| QUESTION 1: Your gender?                    |                                  |
| If you are a male then circle 1 as follows: |                                  |
| Male.....                                   |                                  |
| Female.....                                 |                                  |

1. Your gender?

Male.....

Female.....

2. How old are you (in complete years)?

e.g. if you are 35 then enter

|  |  |
|--|--|
|  |  |
|--|--|

3. Your number of complete years of teaching experience?

|  |  |
|--|--|
|  |  |
|--|--|

e.g. if you have five years experience, then enter 

|   |   |
|---|---|
| 0 | 5 |
|---|---|

4. Your highest academic qualification?

|  |  |   |
|--|--|---|
| Grade 12 (or lower).....                             | <table border="1" style="width: 30px; height: 30px; margin: 0 auto;"><tr><td style="text-align: center;">1</td></tr></table> | 1 |
| 1  |  |   |
| Post school diploma or certificate.....              | <table border="1" style="width: 30px; height: 30px; margin: 0 auto;"><tr><td style="text-align: center;">2</td></tr></table> | 2 |
| 2  |  |   |
| Grade 12 plus a Teacher's Diploma.....               | <table border="1" style="width: 30px; height: 30px; margin: 0 auto;"><tr><td style="text-align: center;">3</td></tr></table> | 3 |
| 3  |  |   |
| Teacher's Diploma & Further Educational Diploma..... | <table border="1" style="width: 30px; height: 30px; margin: 0 auto;"><tr><td style="text-align: center;">4</td></tr></table> | 4 |
| 4  |  |   |
| Bachelor's Degree.....                               | <table border="1" style="width: 30px; height: 30px; margin: 0 auto;"><tr><td style="text-align: center;">5</td></tr></table> | 5 |
| 5  |  |   |
| Bachelor's Degree & Teacher's Diploma.....           | <table border="1" style="width: 30px; height: 30px; margin: 0 auto;"><tr><td style="text-align: center;">6</td></tr></table> | 6 |
| 6  |  |   |
| Honours Degree & Teacher's Diploma .....             | <table border="1" style="width: 30px; height: 30px; margin: 0 auto;"><tr><td style="text-align: center;">7</td></tr></table> | 7 |
| 7  |  |   |
|  | <table border="1" style="width: 30px; height: 30px; margin: 0 auto;"><tr><td style="text-align: center;">8</td></tr></table> | 8 |
| 8  |  |   |



Masters Degree & Teacher's Diploma .....

Doctoral Degree & Teacher's Diploma .....

5. Your present post level?

Educator.....

Head of Department.....

Deputy Principal.....

Principal.....

Do you have a teacher's diploma Y    N

6. Classification of the school where you are currently teaching?

Primary school.....

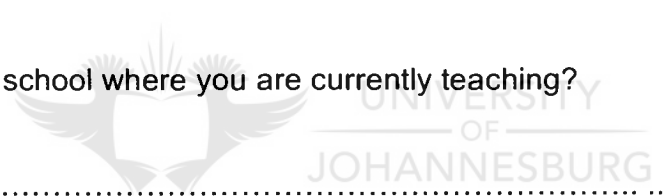
Secondary school.....

Combined school.....

Special school.....

Special school.....

Other (specify).....





7. Which one of the following best describes the location of your school?

- In or close to a city.....  1
- 2
- In a suburban area.....  3
- In a developed township.....  4
- In an informal settlement.....  5
- In a rural area.....  5

8. How would you describe the attendance of educators at your school?

- Excellent (90% to 100% present per week. At least 9 out of every 10 educators are at school) .....  1
- Average (70% to 89% present per week. At least 7 but fewer than 9 educators out of every 10 are present at school).....  2
- Poor (Less than 69% present per week. Fewer than 7 out of every 10 educators are present at school).....  3

9. How would you describe the attendance of learners at your school?

- Excellent (36 or more are present per week out of every 40, i.e. 90% or more).....  1
- 2
- Average (32 to 35 are present per week out of every 40, i.e. 80 to 89%)  3

Poor (31 or fewer are present per week out of every 40, i.e. less than 80%)

10. What, would you say, is the average age of your school management team?

|                           |   |
|---------------------------|---|
| 25 years or younger ..... | 1 |
| 25 – 36 years .....       | 2 |
| 36 – 45 years .....       | 3 |
| 46 – 55 years .....       | 4 |
| 55 years or older .....   | 5 |



## SECTION B

There are no right or wrong answers. We are only interested in your honest opinion.  
Mark your opinion by circling the appropriate number/code on the scale provided for each question.

Please indicate to what extent you agree/disagree with each of the following statements.

Give your opinion using the following 6 point scale:

- 6 Strongly agree
- 5 Agree
- 4 Partially agree (leaning more to agreeing)
- 3 Partially disagree (leaning more to disagreeing)
- 2 Disagree
- 1 Strongly Disagree

Example: The principal of my school welcomes constructive feedback.

(If you disagree but not strongly then mark 2 as follows):

STRONGLY

- 1
- 2
- 3
- 4
- 5
- 6

STRONGLY

DISAGREE

AGREE

INDICATE TO WHAT EXTENT YOU AGREE / DISAGREE WITH EACH OF THE FOLLOWING STATEMENTS REGARDING THE IMPLEMENTATION OF THE IQMS AT YOU SCHOOL

1. Opportunities for discussion about IQMS are allowed.

STRONGLY  
DISAGREE

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|

STRONGLY  
AGREE

2. The SMT has received sufficient training in implementing IQMS.

STRONGLY  
DISAGREE

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|

STRONGLY  
AGREE

3. At my school peers can efficiently appraise an educator.

STRONGLY  
DISAGREE

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|

STRONGLY  
AGREE

4. Educators are sufficiently knowledgeable about the complexities of teacher appraisal.

STRONGLY  
DISAGREE

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|

STRONGLY  
AGREE

5. At my school educators have the ability to be constructive in their criticism

|                      |   |   |   |   |   |   |                   |
|----------------------|---|---|---|---|---|---|-------------------|
| STRONGLY<br>DISAGREE | 1 | 2 | 3 | 4 | 5 | 6 | STRONGLY<br>AGREE |
|----------------------|---|---|---|---|---|---|-------------------|

6. At my school educators perceive the educator appraisals as fair.

|                      |   |   |   |   |   |   |                   |
|----------------------|---|---|---|---|---|---|-------------------|
| STRONGLY<br>DISAGREE | 1 | 2 | 3 | 4 | 5 | 6 | STRONGLY<br>AGREE |
|----------------------|---|---|---|---|---|---|-------------------|

INDICATE TO WHAT EXTENT YOU AGREE / DISAGREE WITH EACH OF THE FOLLOWING STATEMENTS REGARDING THE IMPLEMENTATION OF THE IQMS AT YOU SCHOOL

7. Situational factors should be / is taken into consideration when an educator is appraised.

|                      |   |   |   |   |   |   |                   |
|----------------------|---|---|---|---|---|---|-------------------|
| STRONGLY<br>DISAGREE | 1 | 2 | 3 | 4 | 5 | 6 | STRONGLY<br>AGREE |
|----------------------|---|---|---|---|---|---|-------------------|

8 At my school educators are sensitive towards each others needs when doing Appraisal

|                      |   |   |   |   |   |   |                   |
|----------------------|---|---|---|---|---|---|-------------------|
| STRONGLY<br>DISAGREE | 1 | 2 | 3 | 4 | 5 | 6 | STRONGLY<br>AGREE |
|----------------------|---|---|---|---|---|---|-------------------|

9. At my school educators take part in the development of performance standards.

|                      |   |   |   |   |   |   |                   |
|----------------------|---|---|---|---|---|---|-------------------|
| STRONGLY<br>DISAGREE | 1 | 2 | 3 | 4 | 5 | 6 | STRONGLY<br>AGREE |
|----------------------|---|---|---|---|---|---|-------------------|

10. When evaluated an educator should be asked for his/her opinion about the appraisal process.

STRONGLY  
DISAGREE

|   |   |   |   |   |   |
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| 1 | 2 | 3 | 4 | 5 | 6 |
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STRONGLY  
AGREE

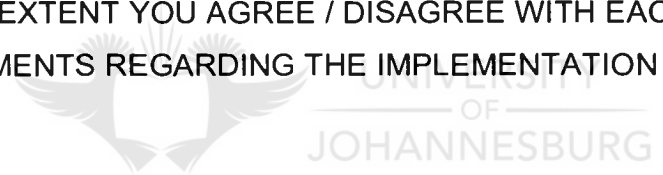
11. An educator should be permitted to evaluate the criteria that will be used during the appraisal.

STRONGLY  
DISAGREE

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 |
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STRONGLY  
AGREE

INDICATE TO WHAT EXTENT YOU AGREE / DISAGREE WITH EACH OF THE FOLLOWING STATEMENTS REGARDING THE IMPLEMENTATION OF THE IQMS AT YOUR SCHOOL



12. Principals will become accountable leaders as a result of the implementation of IQMS

STRONGLY  
DISAGREE

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|

STRONGLY  
AGREE

13. The implementation of IQMS ensures that all role players forms part of the decision making process.

STRONGLY  
DISAGREE

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|

STRONGLY  
AGREE

14. Our principal encourages participative decision-making during the implementation of IQMS.

STRONGLY  
DISAGREE

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|

STRONGLY  
AGREE

15. The District Support Group (DSG) always provides sufficient support during the implementation of IQMS.

STRONGLY  
DISAGREE

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|

STRONGLY  
AGREE

16. The DSG always provide sufficient mentoring during the implementation of IQMS.

STRONGLY  
DISAGREE

|   |   |   |   |   |   |
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| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|

STRONGLY  
AGREE

INDICATE TO WHAT EXTENT YOU AGREE / DISAGREE WITH EACH OF THE FOLLOWING STATEMENTS REGARDING THE IMPLEMENTATION OF THE IQMS AT YOU SCHOOL

17. The DSG should have a pre-evaluation discussion with the person being evaluated.

STRONGLY  
DISAGREE

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|

STRONGLY  
AGREE

18. The DSG should have a post-evaluation discussion with the person being evaluated.

STRONGLY  
DISAGREE

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|

STRONGLY  
AGREE

19. At my school, the School Development Team (SDT) is democratically elected by the staff.

STRONGLY  
DISAGREE

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|

STRONGLY  
AGREE



20. At my school, the SDT ensures that all staff members are sufficiently trained on IQMS.

STRONGLY  
DISAGREE

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|

STRONGLY  
AGREE

21. At my school, the School Improvement Plan (SIP) is developed through collaboration with educators.

STRONGLY  
DISAGREE

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|

STRONGLY  
AGREE



INDICATE TO WHAT EXTENT YOU AGREE / DISAGREE WITH EACH OF THE FOLLOWING STATEMENTS REGARDING THE IMPLEMENTATION OF THE IQMS AT YOU SCHOOL

22. At my school the Personal Growth Plan (PGP) is developed by the individual educator.

|                      |   |   |   |   |   |   |                   |
|----------------------|---|---|---|---|---|---|-------------------|
| STRONGLY<br>DISAGREE | 1 | 2 | 3 | 4 | 5 | 6 | STRONGLY<br>AGREE |
|----------------------|---|---|---|---|---|---|-------------------|

23. The principal of a school should ensure that every educator embarks on a process of self-evaluation.

|                      |   |   |   |   |   |   |                   |
|----------------------|---|---|---|---|---|---|-------------------|
| STRONGLY<br>DISAGREE | 1 | 2 | 3 | 4 | 5 | 6 | STRONGLY<br>AGREE |
|----------------------|---|---|---|---|---|---|-------------------|

24. At my school the principal ensures that every educator understands how the IQMS system works.

|                      |   |   |   |   |   |   |                   |
|----------------------|---|---|---|---|---|---|-------------------|
| STRONGLY<br>DISAGREE | 1 | 2 | 3 | 4 | 5 | 6 | STRONGLY<br>AGREE |
|----------------------|---|---|---|---|---|---|-------------------|

25. The SDT tracks progress with regards to implementation of IQMS.

|                      |   |   |   |   |   |   |                   |
|----------------------|---|---|---|---|---|---|-------------------|
| STRONGLY<br>DISAGREE | 1 | 2 | 3 | 4 | 5 | 6 | STRONGLY<br>AGREE |
|----------------------|---|---|---|---|---|---|-------------------|

26. The SDT provides mentoring to the educator being evaluated.

STRONGLY  
DISAGREE

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|

STRONGLY  
AGREE

27. The SDT provides support to the educator being evaluated.

STRONGLY  
DISAGREE

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 |
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STRONGLY  
AGREE

INDICATE TO WHAT EXTENT YOU AGREE / DISAGREE WITH EACH OF THE FOLLOWING STATEMENTS REGARDING THE IMPLEMENTATION OF THE IQMS AT YOUR SCHOOL

28. The IQMS allows for the development of a Personal Group Plan (PGP)

STRONGLY  
DISAGREE

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|

STRONGLY  
AGREE

29. At my school, the principal demonstrates a commitment towards the effective implementation of the IQMS.

STRONGLY  
DISAGREE

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|

STRONGLY  
AGREE

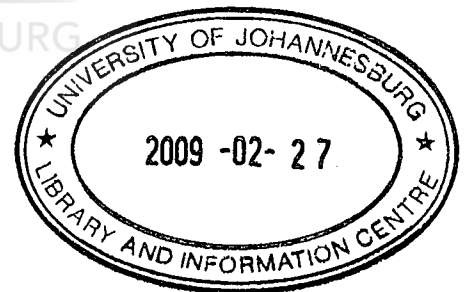
30. At my school, the principal monitors the management plans' for the IQMS.

|                      |   |   |   |   |   |   |                   |
|----------------------|---|---|---|---|---|---|-------------------|
| STRONGLY<br>DISAGREE | 1 | 2 | 3 | 4 | 5 | 6 | STRONGLY<br>AGREE |
|----------------------|---|---|---|---|---|---|-------------------|

31. At my school, the principal ensure that self-evaluation is done in terms of the Whole School Evaluation policy.

|                      |   |   |   |   |   |   |                   |
|----------------------|---|---|---|---|---|---|-------------------|
| STRONGLY<br>DISAGREE | 1 | 2 | 3 | 4 | 5 | 6 | STRONGLY<br>AGREE |
|----------------------|---|---|---|---|---|---|-------------------|

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