

**THE IMPACT OF THE INTEGRATED QUALITY MANAGEMENT
ON SCHOOL LEADERSHIP**

By

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I dedicate this study to my grandchildren

Tiya and Tahin.

You are my inspiration.

Thank you for filling my life with so much joy.

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SINOPSIS

The purpose of this research was to investigate the impact of IQMS on school leadership. Based on this, the researcher sought to recommend a management strategy to assist school leadership to cope with the challenges posed by IQMS.

The Integrated Quality Management System (IQMS), a national initiative, is essentially associated with the enhancement of teaching and learning. IQMS comprises three components: Developmental Appraisal System (DAS), Performance Management System (PMS) and Whole School Evaluation (WSE). The three components ought to complement each other and run concurrently. The role of the leader (principal) is central to the management of a school hence the school leader is ultimately responsible for the implementation of this expansive system. Because of the tremendous challenges inherent in IQMS, it is necessary to ascertain the effect of IQMS in schools, in particular on school leadership.

In order to undertake this research, I used the quantitative research method in order to engage the questionnaire as a research instrument. The sample consists of schools in four districts of the Gauteng Department of Education (GDE). Former Education Departments according to primary and secondary schools are represented proportionately, based on representation within the GDE. In order to determine the impact of IQMS on school leadership, it was necessary to determine how successful the implementation of IQMS is. It was therefore necessary to quantify respondents' level of understanding IQMS and to what extent they believe in IQMS. In addition to these factors, it seemed appropriate to include a factor that encompasses school leadership and educator appraisal.

The findings of the research were clustered according to the four sections of the questionnaire. Some of these findings were:

- A large majority of educators within GDE received training in IQMS.
- The quality of the IQMS training was compromised by the brevity of training sessions.
- Some of the trainers conducted the training sessions in a mechanical manner.
- Districts are ill-prepared to support the implementation and monitoring of the IQMS process.
- Educator development is an essential aspect of IQMS as it promotes effective teaching and learning.
- Educators do not have sufficient time to serve on DSGs.
- Lack of material and human resources inhibits the successful implementation of the IQMS process.

Based on the findings of the research, possible strategies are recommended to address certain shortcomings in the implementation of IQMS:

- how to improve training initiatives for educators in order to ensure effective implementation of the IQMS process.
- the role of district officials with regard to the implementation and monitoring of the IQMS process.
- ensuring that stakeholders have a common understanding of all new policies being implemented.
- making provision for adequate human resources which is pivotal to the effective implementation of IQMS.

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GLOSSARY OF TERMINOLOGY

DAS	:	Development Appraisal
PMS	:	Performance Measurement System
WSE	:	Whole School Evaluation
IWSE	:	Internal Whole School Evaluation
EWSE	:	External Whole School Evaluation
IQMS	:	Integrated Quality Management System
SMT	:	Senior Management Team
SDT	:	Staff Development Team
DSG	:	Development Support Group
SIP	:	School Improvement Plan
PGP	:	Personal Growth Plan
QMS	:	Quality Management System
DIP	:	District Improvement Plan
DoE	:	Department of Education
ELRC	:	Education Labour Relations Council
GDE	:	Gauteng Department of Education
IDSO	:	Institute Development and Support Officer
LA	:	Learning Area
LOLT	:	Language of Learning and Teaching
LTSM	:	Learning and Teaching Support Material
OFSTED	:	Office of Standards in Education
SBST	:	School Based Support Team
SGB	:	School Governing Body
SSE	:	School Self Evaluation
HOD	:	Head of Department: Learning Area Specialist
CO	:	Classroom Observation

CHAPTER 1:

PROBLEM STATEMENT AND ORIENTATION

1.1 INTRODUCTION

The focus of this research is on the impact of the Integrated Quality Management System (IQMS) on school leadership. The introduction of the Integrated Quality Management System (IQMS) is yet another approach that brings with it a set of challenges for leadership in schools. According to the Collective Agreement Number 8 of 2003:4, of the Education Labour Relations Council (ELRC), the tenets of IQMS are underpinned by the purpose of quality management systems which are to determine competence; to assess strengths and areas for development; to provide support and opportunities for development; to ensure continued growth; to promote accountability and to monitor the overall effectiveness of an institution.

According to this document (Resolution 8: ELRC, 2003), it is the responsibility of the School Management Team (SMT) which includes the principal, deputy principal and heads of departments to ensure that the school is operating effectively. Within the context of IQMS, this implies that school leadership is responsible for promoting quality teaching and learning as well as accountability through the implementation of Whole School Evaluation (WSE), the Development Appraisal System (DAS) as well as the Performance Management System (PMS). As part of the SMT, the principal is also required to be part of the Staff Development Team (SDT) as well as part of a Developmental Support Group (DSG) should an educator prefer the principal to be part of the panel. In addition, one of the main tasks of the principal is to verify that the specific and overall ratings of educators being submitted to the DoE are accurate and to ensure fairness and consistency of all submissions.

There were seventeen departments of education within the country “fragmented along racial and ethnic line” and “saturated with racial ideology and educational

doctrines and apartheid...” ANC Policy Framework (1994:2). As a result, the education system was characterised by huge disparities amongst the different races. According to Govender (1997:5) the amalgamation of the seventeen departments into a single non-racial department resulted in significant policy changes at macro-level. Some of the legislation responsible for these changes: The Educators’ Employment Act 76 of 1998 which provides for the employment of educators by the State, the regulation of the conditions of service and related matters; The Labour Relations Act 66 of 1995 designed amongst others to ensure labour peace and democratisation of the workplace and the Employment Equity Act 55 of 1998 to provide for employment equity in order to eliminate unfair discrimination in employment. In addition, the advent of the Constitution in 1996 which includes a Bill of Rights enshrining the rights of all people, including that of children, made a significant impact on the education environment. These policy changes impacted profoundly on schools, especially with regard to quality assurance in education. These changes also have implications for the responsibilities of school leadership, in particular the principal (Govender, 1997:7).

Since the inception of our democracy more than a decade ago, change, both simple and complex, has been implemented in a myriad of ways. Fullan (2001:32) suggests that real change, whether desired or not, represents a serious and collective experience characterised by ambivalence and uncertainty. Fullan (2001:78) adds that complex changes promise to accomplish more but they also demand more effort. While change is by nature dynamic, for the principal who has been referred to in Fullan (2001:78) as the “gatekeeper of change”, it could also be turbulent as it may lead to doubts and frustration. Fullan (2001:139) quotes a response by a principal interviewed: “The conflict for me comes from going home every night acutely aware of what I didn’t get done and feeling after six years that I ought to have a better batting average than I have...” Now, after more than a decade of transformation, the principal is once again playing the gatekeeper of change as the DoE has launched one more innovation to enhance teaching and learning and ensure quality education.

An important task facing the government after the 1994 election, was to transform education and training. According to Heese (1992:vii) the South African educational picture was dominated by the fact that the process of teaching and learning had largely broken down in disadvantaged communities. Heese (1992) offers the following as reasons for the breakdown: school going children not accommodated at schools; learners not making use of opportunities to learn; teachers not teaching and non-existent or shortages of infrastructure and/or learning support material. To transform education and training, the culture of teaching and learning had to be restored but this posed a huge problem. To address a problem of this magnitude required complex change which, in turn requires a change of mindset and attitudes (Govender, 1997:6-7)

Mathula (2004:1) cites that a number of management approaches have been implemented over the years “we are in the midst of the fifth serious attempt at large-scale Performance Management and Evaluations reform in the past decade”. The aim of the DoE was to address the imbalances in resources at schools and to ensure that the culture of teaching and learning is restored. With the introduction of each new approach, school leadership is faced with the challenge of developing strategies to cope with the demands posed by these approaches.

The next section looks at the rationale for the study.

1.2 RATIONALE FOR THE STUDY

The Integrated Quality Management System (IQMS) is the latest quality assurance approach being implemented to enhance the delivery process of a quality education for all South Africans. IQMS is informed by Schedule 1 of the Employment of Educators Act (EEA), No 76 of 1998. According to this document the performance standards for educators by which their performance is to be evaluated consists of various components. The Collective Agreement Number 8 of 2003 on IQMS summarises these components as:

Development Appraisal (DAS) which focuses on the individual in a transparent manner in order to identify strengths and weaknesses. Programmes for development are then designed according to specific needs.

Performance Management System (PMS) is the process that evaluates individual educators for salary progression, grade progression, affirmation of appointments and rewards and incentives.

Whole School Evaluation (WSE) is designed to evaluate the general effectiveness of the school. This process also assesses the quality of teaching and learning. What makes this revised instrument different to the manner in which DAS and WSE were implemented previously, is that the three components are integrated in an attempt to ensure maximum effectiveness and co-ordination at school level.

Because of the challenges inherent in IQMS and considering the fact that school leadership is ultimately responsible for ensuring implementation of this expansive system, it was necessary to undertake this study to ascertain the implications that IQMS will have on the task that leadership at schools represents. According to Sybout and Wendel (1994:2) one of the most significant challenges facing school leadership is the range of expectations placed on the position. Questions that need clarification are: What are the pitfalls of previous quality management systems? How will IQMS address these shortcomings adequately? Could the

importance of evaluation and monitoring be emphasised at the expense of quality teaching?

Because of the multi-dimensional nature of IQMS, the implementation of this instrument will impact on all stakeholders: SMTs, educators, parents, learners, public service staff, school governing bodies, educator organisations as well as departmental officials. The effect of the complexity that IQMS implementation has on stakeholders may result in effective and collaborative leadership being seriously compromised (Davies and Ellison, 1997:147). In this context the term “innovation overload” is believed to be in direct contradiction to the cliché ‘ “ working smarter -not harder” (Davies and Ellison, 1997:131,140).

Gardner (1995) in Davies and Ellison (1997:140) identifies a pivotal concern: school leaders often have to function in a context of complexity. The implementation of IQMS could very well compound this problem; innovation overload could result in teacher apathy that could lead to hostility while over-burdening could result in failure to translate good policy into sound practice (Davies and Ellison, 1997: 147).

1.3 STATEMENT OF THE RESEARCH PROBLEM

In view of the preceding information, the research problem encompasses the following questions:

What is the impact of IQMS on school leadership?

What kind of support is required to assist principals to manage their varied and multitude of duties/roles with regard to the implementation of IQMS?

What are the perceptions of educators regarding the effectiveness of IQMS?

How can Developmental Support Groups (DSGs) enhance educator growth?

In the next section the researcher provides the aims of the research.

1.4 AIMS OF THE RESEARCH

In view of the problems formulated above, the general aim of the research is to determine the impact IQMS will have on the leadership of schools.

In order to achieve the general aim, it is the specific aim of this study to:

to investigate the impact that IQMS has on school leadership

to devise a management strategy to assist school leadership to cope with the challenges posed by IQMS.

to understand the effectiveness of IQMS in schools, as perceived by educators

to critically appraise how DSGs can enhance educator growth.

In view of the preceding problem and aims statements, the methods envisaged to research the problem of the impact IQMS will have on the leadership of schools will now be discussed.

1.5 RESEARCH DESIGN

According to Mouton (2001:74), a research design can be defined as a plan or blueprint of how one intends conducting the research. Mouton further explains that a research design focuses on the end product (research findings), formulates a research problem and focuses on the logic of the research.

1.5.1 Method of research

The aim of this research is directed at establishing the implications (and more specifically the possible impact) that IQMS will have on school leadership. A quantitative research strategy was used.

The method earmarked for this research is initially descriptive by nature as the aim is to describe quality assurance approaches with particular reference to the impact IQMS has on school leadership.

1.5.2 Literature review

In order to obtain a theoretical background to the study, literature such as articles, journals and books will be used as well as referencing to educational legislation to expound the main components of this quality assurance instrument.

1.5.3 Sampling technique

Crucial to the validity of the research data, is the process of identifying the sample that is most representative of the population. Bless & Higson-Smith (1995:89) suggests that the first means of ensuring a representative sample is the use of a complete and correct sampling frame, which is the list of all units from which the sample is to be drawn. For the purpose of this study the researcher decided on stratified random sampling (De Vos, 2002:205).

Stratification consists of the universe being divided into a number of groups called strata (Ibid). The researcher divided the population into different groups, called strata. Then within each stratum, random sampling takes place using either the simple or interval sampling method. The population targeted for this survey are educators in four districts of Gauteng Department of Education (GDE). The sample drawn reflects a proportionate distribution of schools - primary and secondary from former education departments. The data collected was used to make inferences about the total school population of Gauteng.

1.5.4 Data Collection

An empirical study was undertaken based on the literature survey mentioned above. A structured questionnaire was designed using the literature as a foundation in an effort to obtain the opinion of all categories of school-based educators regarding the implementation of IQMS and its impact on the leadership of schools. The questionnaire focuses on four key areas: Understanding IQMS, Believing in IQMS, WSE and Management and Appraisal.

1.5.5 Methods of data analysis

The SPSS 11.0 programme will be used to analyse the data. To ensure that items in the questionnaire can be subjected to factor analytic techniques, the Kaiser-Meyer-Olkin (KMO) Measure of Sampling Adequacy (MSA) is to be used. The construct validity of the instrument in this research will be investigated by means of successive first and second order factor analytic procedures performed on 42 items.

1.5.6 Validity and Reliability

The researcher will obtain data from a single questionnaire that will be sent to all schools within the sample. Bless et al (1995:130) state that reliability is concerned with the consistency of the measure and contend that an instrument which

produces accurate scores every time it is used to measure an unchanging value, has high reliability. According to De Vos (2002:167), content validity is concerned with the representivity or sampling of the content of an instrument. To this end, the items included in the questionnaire were based on theoretical concepts that emerged from the literature review.

1.6 ETHICAL CONSIDERATIONS

The researcher abided by the ethical measures of the University of Johannesburg. In this regard the following will be adhered to:

- analysis will be done on the basis of the data collected through the questionnaire using statistical procedures;
- respect for the anonymity of the participant as a unique human being will be maintained;
- the researcher accepts accountability for the research and will act in a responsible manner;
- integrity will be promoted by being honest and fair;
- confidentiality will be respected under all circumstances;
- individuals' participation in this research will be on a voluntary basis.
- The researcher will ensure that information obtained will be viewed in a sensitive light.

1.7 CONCEPT CLARIFICATION

1.7.1 Management

In the context of this study, the view of Everard and Morris (1996:4) on management is adopted. He states that the management is about setting and improving organisational standards. This view suggests that the school leader not only promotes excellence, but continually strives to sustain excellence in the

organisation. According to the principles of IQMS, the management of schools is responsible for ensuring quality teaching and learning as well as ensuring the overall effectiveness of the school. In addition the principal, through monitoring and evaluation processes, will ensure that whole school effectiveness is sustained. Smit and de Cronje (1992:43) consider the nature of management to be multi-skilled in order to do justice to the demanding task of managing an organisation profitably.

The varied and diverse nature of the principal's duties and responsibilities should be viewed in the same light. The roles and responsibilities of the principal are set out in the Policy Handbook for Educators 2003 of the ELRC: The principal assumes the roles of amongst others maintenance officer, security officer and courier service. He/she also plays a pastoral role when an educator loses a loved one or has to tend to a sick child. The school head often intervenes in a family dispute when it affects the learning performance of a learner. In addition, the principal's professional duties appear never-ending: allocation of resources; staff development; planning; co-ordinating; negotiating; mediating; the list goes on. In 2000, the term "accounting officer" has been added to the list by the DoE. School leaders are told that under The Public Finance Management Act 1 of 2000, they are accountable for anything that may adversely affect the efficiency and effectiveness of the school.

1.7.2 Leadership

Leadership does not simply suggest a co-ordinator of processes, but rather an active and deliberate process. Leadership is about helping the group to move forward by utilising the efforts of individuals who complement and enhance each other's skills, linking the skills to the strengthening unit of a common purpose... making the parts whole " (Davies and Ellis, 1997:146).

The role of the school leader in the implementation of IQMS is no different to the leadership role mentioned by Davies (1997) as the principal has to coordinate the efforts of educators to ensure that whole school development is effective. In order to do this, the principal must make a concerted effort to know the strengths and concerns of the educators. Failure by the school head to know and understand his/her team will result in failing to harness the various competencies of the staff and this may render the group ineffective (Ibid,1997:146).

The current activities of school leaders are shaped by the need to manage change and cope with complexity: the contemporary school leader must be politically astute, a successful professional entrepreneur, a skilled mediator and an effective agent of change (Harris & Lambert, 2003:13). These views aptly describe the role of the school leader in the context of IQMS. As part of the SDT, the principal prepares and monitors the management plan for IQMS. As part of the SMT the principal is responsible for the efficient and effective running of the school and in the spirit of team building, regularly and consistently acknowledge the inputs of staff members.

As is the case in the private sector, the prime task of school leadership according to collective Agreement No 8 of the ELRC, is to make the school as efficient and effective as possible as well as ensuring that all learners receive quality education. The principal's function as leader of the institute is therefore one of quality management.

1.7.3 Quality Management

According to Williams (1994:18) quality is the product of an organisational culture that drives constant improvement and concern for producing high-quality goods and service. Williams (1994:103) also posits that quality management is that

aspect of the overall management function that determines and implements the quality policy.

School Management Teams (SMTs) are tasked with the responsibility of producing the high-quality goods and services. The philosophy underpinning IQMS contains these principles: to provide support and opportunities for development to assure continued growth and to monitor an institution's overall effectiveness.

The purpose of the development and monitoring processes is to ensure that quality education is achieved and maintained.

1.7.4 Monitoring

Sinclair (1995:1071) defines monitoring as something that you regularly check for its development or progress, and sometimes comment on it. Bubb and Hoare (2001:1) explain that the purpose of performance management is to strengthen the link between the school development plan and the aspirations of the educators in terms of their own development. It is further pointed out by Bubb (2001:5,26), that in addition to rigorous data analysis, performance management also requires regular monitoring. Monitoring is a tool for improvement but there should be a clear vision about where the school is going.

Monitoring forms part of the implementation process of IQMS. The monitoring process is an ongoing activity, conducted by departmental officials, SMTs, SDTs and Developmental Support Groups (DSGs). As is the case with the other IQMS components, the principal as an SMT member, as well as being part of the DSGs, will ensure that development and improvement is taking place by regularly tracking the progress of the process. The monitoring process also requires that guidance is given to individuals or groups and pointing out achievements and areas for improvement. Moreover, it is the responsibility of school leadership to ensure that all educators have a clear understanding of the vision of the school.

Teacher evaluation forms part of DAS and is one of the many functions the school principal is responsible for. It is therefore necessary to expound on teacher evaluation as a process that is linked to the school organisation.

1.7.5 Evaluation

Tyler (1949) in Hopkins (1989:3), originally defined evaluation as the process of determining to what extent the educational objectives are being realised. Hopkins (1989:3) also refers to Nevo (1986:16) who points out that there is a considerable consensus regarding the definition of evaluation as the assessment of merit or worth.

Evaluation in Darling-Hammond (1990:390) is introduced as a by-product of concern with the effectiveness of schools in achieving learning outcomes. A fundamental principle of IQMS is enhancing the quality of teaching and learning. This principle is reflected in Darling-Hammond (1990:390) by the assertion that evaluation can potentially raise the instructional productivity in terms of enhanced learning for students and increased rates of return for education.

Teacher evaluation is an essential ingredient in DAS and PMS. In the first instance the purpose of evaluation is developmental thus formative. In respect of PMS the individual is evaluated for the purpose of pay progression, at this stage the evaluation becomes summative.

Darling-Hammond's (1990) assertion that in order for evaluation to be acceptable to educators, evaluation systems must reflect features consistent with democracy concurs with the manner in which educators are evaluated by means of the IQMS process. The entire evaluation process must be conducted in a transparent manner with educators expected to do a self evaluation after which each educator completes a Personal Growth Plan (PGP). The latter is used by the School

Development Team (SDT) to complete the School Improvement Plan (SIP) which is submitted to the district office where it informs the District Improvement Plan (DIP). The summative evaluation for the purpose of the Performance Management System (PMS) is undertaken by the DSGs in consultation with the educator. Before these scores are submitted to the DoE, it is moderated by the principal for accuracy and to ensure fairness and consistency of all submissions.

1.7.6 Control

In trying to establish a case for control, the management concept espoused by Taylorism in Hopkins (1989:3) sees humans as essentially lazy and interested in obtaining maximum reward in return for minimal efforts. Consequently, a manager has to exercise close supervision over all aspects of a subordinates work in order to ensure that each job is completed satisfactorily (Kydd, Crawford and Riches,1997:62-63).

Van der Westhuizen (1991:232) posits that control as a management function aims at ensuring that all planned goals and objectives are attained. Control is therefore centred on achieving a common goal: with regard to IQMS the common goal is the realization of quality teaching and learning. Control is necessary because an educational leader can never really be certain that matters will take the planned course. Van der Westhuizen (1991:232) contends that authority is vested in the educational leader and this demands that the leader takes responsible control. He reiterates this viewpoint by stating that management is ensured and mismanagement is corrected through control.

With respect to the implementation of IQMS, it would seem that the DoE concur with the views expressed by van der Westhuizen (1991:232) in that the principal is tasked with using his/her authority to ensure proper management through control. According to the Collective Agreement No 8 of 2003 of the ELRC, it is the responsibility of the principal to carry out an internal moderation of the evaluation

results of educators to ensure fairness and consistency. In addition, the principal as a member of the SDT prepares and monitors the management plan of IQMS. Hence the principal, albeit in various capacities, has to perform a controlling function to ensure that planned goals and objectives are attained. According to Bush (2003:52), the structure is assumed to influence the behaviour of individuals holding particular roles in the organisation.

1.7.7 Organisational structures

According to Rondinelli, Middleton and Verspoor (1990:119), organisational structures establish predictable patterns of relationships among people by dividing work into distinct tasks and by coordinating the activities of their members. The structure of an organisation should be designed to allow groups of people to achieve their goals efficiently and effectively and to respond to changes in the environment in which they are working Rondinelli et al (1990:119). In the same vein, Godden, Buckland, Coombe et al (1996:42) describe organisational structures as the way in which duties and responsibilities are divided among organisations and institutions in the system and among units and individuals within each institution and organisation. According to Everard and Morris (1996:150), an organisation's structure embraces the organisations chart, the committees, the departments, the roles, the hierarchical levels and authority, the procedures in the staff manual, the time table and so forth.

The organisational structures outlined above are prominent features in the construction of IQMS. The roles and responsibilities of each group or team are divided into distinct tasks (Performance Standards), while guidelines are given on how the activities must be coordinated to enable the different programmes of the Quality Management System to inform and strengthen one another.

1.8 DIVISION OF CHAPTERS

The researcher will present this mini-dissertation in five chapters.

Chapter one presents an introduction and orientation, giving an overview of the elements of the study. Chapter one consists of the introduction, background to the research problem, statement of the research problem, aims of the research, research methodology, clarification of important concepts division of chapters and conclusion.

Chapter two presents a literature review to create a conceptual framework for the implementation of the Integrated Quality Management System (IQMS) and the possible impact it could have on the leadership of schools.

Chapter three outlines the research design and methodology used to investigate the impact of IQMS on school leadership. This methodology is followed to cohere with the principles of quantitative research.

Chapter four concentrates on the analysis and interpretation of the empirical data collected by means of questionnaires.

Chapter five consists of a summary of the literature and empirical findings as well as make recommendations made for the implementation of IQMS within the current management paradigm and suggest a management strategy that will assist school leadership to cope with the challenges posed by IQMS.

1.9 SUMMARY

This chapter presented a contextual framework for the study. The research problem as well as the aim of the study was stated. The focus of the research was outlined and the research method used to investigate the impact of IQMS on school leadership was explained. Salient concepts were discussed to create a clearer understanding of the study. Finally, a brief summary was presented.

Chapter two concentrates on literature to elucidate and contextualize components of and pertinent issues around IQMS with regard to its impact on school leadership.



CHAPTER 2: LITERATURE REVIEW

2.1 INTRODUCTION

In the previous chapter the research problem as well as the aim of the study was stated. In addition the research method used to investigate the impact of IQMS on school leadership was explained.

This chapter focuses on concepts which the researcher believes are central to determining the impact the Integrated Quality Management System (IQMS) will have on school leadership. The concepts looked at include school leadership; performance appraisal and performance management; professional development; supervision and evaluation. Also included in the literature study are events and policies that led to the creation of various quality management approaches and the establishment of IQMS; the components of IQMS is described and discussed and finally, the possible impact of IQMS on the leadership of schools will be explored.

Morgan (1997) in Bush (2003:192) suggests that because of the complex, multi-faceted and paradoxical nature of organisations, the challenges facing management are demanding. "In any given situation there may be many different tendencies and dimensions, all of which have an impact on effective management" (Bush, 2003:347). The implementation of IQMS adds to the complexity referred to by Morgan (1997). No single leadership model mentioned will adequately address the challenges inherent in IQMS. To do justice to the implementation of this system, it is necessary to "integrate the various leadership models into an overarching framework" as suggested in Bush (2003:192).

2.2 BACKGROUND OVERVIEW PRIOR TO IQMS

Mathula (2004:1) recounts how the past decade was highlighted by inter alia the need to transform the education system as well as an outcry for the public sector to deliver. Mathula (2004:1) posits that Performance Management and Evaluations took centre stage as part of the “reform process in education” but that its implementation was seriously hampered by the legacy of the “defiance campaign” of the eighties at former DET schools. The defiance campaign led to a complete breakdown of the inspection system between 1989 and 1990 (Ibid).

The need to initiate an appraisal system for educators was therefore shared by all stakeholders as a way of restoring the culture of teaching, learning and management which involves the creation of a system of accountability. The need for an appraisal system for educators led to the promulgation of the National Education Policy Act 27 of 1996 ((Brunton and Associates, Policy Handbook for Educators, ELRC. 2003: A – 3) . One of the objectives of the Act is the monitoring and evaluation of education.

According to Parsard (2004:4), the Norms and Standards for educators (2000) played a major role in post-apartheid education policy. The Norms and Standards for educators (Brunton and Associates, Policy Handbook for Educators, ELRC. 2003: A-44), commits all educators at school level as well as office-based officials to become reflective practitioners and familiarise themselves with various perspectives, methods and theories that impact on the curriculum. The Norms and Standards for educators (2000) also outlines the roles of managers in curriculum change and delivery and expounds the competencies these role players have to acquire, in order to effect curriculum development and delivery in diverse conditions.

The first major shift in educational reform was the introduction of The Developmental Appraisal System (DAS), determined by Section 4 of the Employment of Educators Act of 1998. This appraisal system is also contained in Resolution 4 of 1998 of the ELRC. DAS provided for the personal and professional development of educators in order to improve the quality of teaching and education management. It was based on the fundamental principle of life long learning and development. This instrument allowed educators to be appraised within their work context by internally based panels. Within this context, needs were assessed and development strategies identified (ELRC, Resolution 4 of 1998)

According to reports in The National Synopsis (1999) and Review Workshop Report (2000) of the National Department of Education, the implementation of DAS has not been successful. The most significant of the many constraints was that DAS was viewed as standing apart from other policies that were being implemented namely, WSE and Curriculum 2005. Unions took a stand against what they felt was an overlap between DAS and WSE; educators were expected to choose their own panels. This resulted in a cumbersome process both in terms of time and the manner in which educators selected their peers, in many instances close friends; many stakeholders showed no interest in a process that they perceived to be offering no reward; the advocacy process had been inadequate and this resulted in a lack of common understanding and support for DAS – the majority of schools just did not attempt the process at all while those that did make some attempt, did not progress beyond the first phase and; most stakeholders were not comfortable with the complexity of DAS (Review Workshop Report, 2000).

The tide of change since 1994 marked a dramatic shift in attitudes towards accountability and control of education in South Africa. Mathula (2004:2) informs that The National Education Policy Act of 1996 was designed to inscribe in law the policy, legislative and monitoring responsibilities of the Minister of Education, and

to formalise relations between National and Provincial Authorities. This policy marked a new phase in the evolution of educational evaluation as it aimed at improving the overall quality of education in schools. As a process, Whole School Evaluation (WSE) is meant to be supportive and developmental rather than punitive and judgmental (Mathula, 2004:10).

Professor Asmal, the former Minister of Education, stated in his foreword on WSE (2001:6): “assuring quality of the education system is the overriding goal of the Ministry, The National Policy on Whole-School Evaluation introduces an effective monitoring and evaluation process that is vital to the improvement of quality and standards of performance in schools.” He reiterates that this policy maintains that it will not be used as a coercive measure, though part of its responsibility will be to ensure that national and provincial policies are complied with. He acknowledged that this policy contains a built-in mechanism for reporting findings and providing feedback to the school and to various stakeholders – the National and Provincial education departments, parents and society generally, on the level of performance achieved by schools in providing quality education.

Guidelines were designed for “a fair” national evaluation for schools, both public and independent. They have to be used when a school was being evaluated according to the National Framework in order to ensure that evaluations were carried out consistently. These Guidelines were to enable schools to measure their performance against national criteria.

Collective Agreement Number 8 of 2003 of the ELRC outlines the nine areas for evaluation which constitute the major aspects of the school’s work:

- basic functionality of the school;
- leadership; management and communication;
- governance and relationships;
- quality of teaching and learning and educator development;

- curriculum provision and resources;
- learner achievement;
- school safety, security and discipline;
- school infrastructure; and
- parents and the community.

The implementation process of WSE was fraught with problems. These problems are outlined as flawed consultation process; flawed advocacy process; level of readiness not established before implementation; flawed implementation management process; inconsistent intervention strategies; myths and inaccurate perceptions about the use and intentions of WSE; fear of victimisation by schools; apathy and resistance to change; perceived hidden agenda; perceived bad-faith negotiations and lack of faith in the capacity of appointed WSE officials (Mathula, 2004:10) .

Role players in education agreed over the years that there is a need for change - to introduce an appraisal instrument acceptable to educator unions that will enhance the competency of educators and the standard of education (Mathula,2004:10) Moreover, it should be an instrument that would integrate various components of quality assurance.

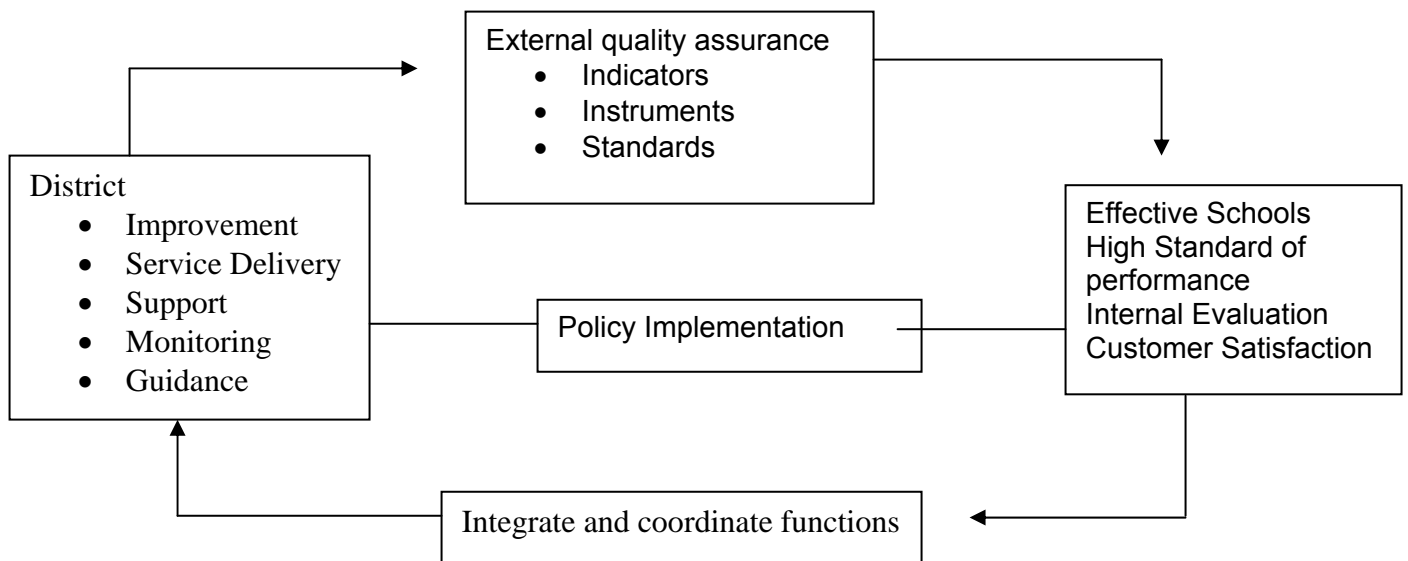
2.3 THE BIRTH OF THE INTEGRATED QUALITY MANAGEMENT SYSTEM

A significant contributory factor to the failure of previous quality management approaches was the lack of effective planning, integration and control. The challenge to the DoE was to design a quality management strategy that would integrate the action plans of the functional areas within the educational environment.

At the Educationally Speaking Conference (2002), Dr Nomso Mgijima, Chief Director of Quality Assurance at the National Department of Education, presented

a proposed Quality Management System (QMS) Model for South Africa, one that would integrate and coordinate functions:

Figure 2.1 A PROPOSED QMS MODEL FOR SOUTH AFRICA



Source: Dr Nomso Mgijima
 Chief Director of Quality Assurance
 National Department of Education

According to Dr Mgijima, the goal of this model (fig 2.1), is to enable the school to run viable quality programmes that satisfy the needs of and add value to the customer, namely, the learners. The school conducts its internal evaluation and developmental appraisal. The WSE and Systemic Evaluation (SE) components then conduct evaluations. The reports are then shared among the school, the district and the external quality assurance verifiers (now known as OFSTED). Based on the findings of the report, the school compiles a SIP. In order to promote a culture of continuous improvement, the district will guide and support the school to develop and plan intervention strategies (Mgijima, 2002)

As stated in the Draft Service Charter of GDE, the DoE has clearly demonstrated its commitment to redress equity and quality. According to the Draft Service

Charter, the current strategic plan is aligned to the Government's 2014 vision and the five key priorities that the GDE has committed itself to are:

- developing the spirit for teaching and learning and contributing to the National identity.
- implementing a technology enabled environment.
- providing a high quality and effective education.
- developing the capacity to ensure efficient delivery of education.
- contributing to economic growth, poverty alleviation, job creation and wellness (Draft Service Charter of GDE).

Dr Mjijima (3rd ESC, 2002) defines Quality Management Systems(QMS) as a combination of processes designed to enhance the implementation of education policies for continuous improvement of quality education, that would ensure the department's aim to ensure efficient delivery of education for all South Africans.

The Integrated Quality Management System (IQMS) is a product of the Total Quality Management (TQM) concept which is a management theory cited by Thompson (2002:164) as a holistic approach in pursuit of a goal of continuous improvement. TQM is also partly geared towards eliminating slack and waste in the system (Ibid:188) as well as a benchmarking system that is focused on standardised procedures and uniform, dependable practices (Thompson, 2002:185). IQMS can be described as a holistic approach in pursuit of continuous improvement as well as a monitoring and evaluation tool to ensure educator development which in turn will lead to a quality education (Resolution 8: ELRC, 2003). However, another dimension was needed that would define the cause and effect relationships between objectives, measures and initiatives across each perspective and down through all levels of the organisation (<https://www.bscol.com/bsc>).

Robert Kaplan and David Norton of the Harvard Organisation School developed a management system called the balanced scorecard to assist organisations with

clarifying their strategies, and translating them into action and to provide meaningful feedback with regard to their performance (Ehlers, 2004:150).

According to <https://www.bscol.com/bsc>, the Balanced Scorecard is a powerful framework to help organisations rapidly implement strategy by translating the vision and strategy into a set of operational objectives that can drive behaviour, and therefore performance. Some of the benefits of this strategy are that it clarifies the vision throughout the organisation, it provides structure for multiple initiatives and integrates the strategic management process across the organisation (Ibid). Because of the nature of this strategy and the benefits mentioned above, the balanced scorecard appears to be an ideal strategic management tool of IQMS. The balanced score card has the potential to provide a framework for strategy management and strategy implementation ((<https://www.bscol.com/bsc>)).

2.4 IQMS AS A MULTIPLE QUALITY MANAGEMENT INITIATIVE

The recently introduced policy innovation for South African schools is the Integrated Quality Management System (IQMS). In terms of Resolution 8 of 2003 an agreement was reached in the Education Labour Relations Council (ELRC) to integrate the existing programmes on quality management in education. The existing instruments comprise the Developmental Appraisal System (DAS) informed by Resolution 4 of 1998, the Performance Measurement System (PMS) as Resolution of 2003 and Whole School Evaluation (WSE). IQMS is informed by Schedule 1 of the Employment of Educators' Act, No 76 of 1998 where the Minister of Education is required to determine performance standards for educators in terms of which their performance is to be evaluated. The main objective of this instrument is to ensure quality public education for all and to constantly improve the quality of teaching and learning (ELRC Policy Handbook for educators, 2003).

The Integrated Quality Management System (IQMS) deals with the alignment of different quality management programmes. The main objective is to ensure quality public education system which constantly improves the quality of teaching and learning (Resolution 8 of 2003). Evaluation of these programmes and practices is essential and on-going. It is clear that each of these programmes has a distinct focus and purpose and there should be no contradiction amongst them.

2.5 DEVELOPMENTAL APPRAISAL SYSTEM (DAS)

This component focuses on the individual educator in a transparent manner in order to identify strengths and weaknesses. Performance appraisal is a process whereby performance is evaluated and feedback is generated in order to effect improvement in the organisation as well as promoting individual development. Grobler (2000) in Mathula (2003:4), define Performance Appraisal as “an ongoing process of evaluating and managing both the behaviour and the outcomes in the workplace.” Mathula (2003:4) also refers to the definition of performance appraisal by Byers and Rue (1994) as “a process that involves determining and communicating to an employee how he or she is performing on the job and, ideally, establishing a plan of improvement”.

With the advent of IQMS, the term performance appraisal has been replaced by the term Developmental Appraisal System (DAS) (ELRC, 2003). It comprises two major activities: staff development and classroom observation. On a low key its objectives are remediation and updating of teacher knowledge and techniques. At a sophisticated professional level it achieves teacher growth through self-activity and working with fellow professionals on intervention programmes. The supervisor plays a crucial supportive role by exposing the educator to teaching models and then assists him to examine his own performance against an overview of universal models (Author unknown, 1990. Workshop handout on Teacher development: Johannesburg).

The Developmental Appraisal System extends direct participation to persons other than officially designated supervisors. This form of participation is aligned to the functions of the SMT, SDT and DSG - educators form part of the two latter structures. The DoE in its advocacy on IQMS, has published a desk calendar in 2006 which outlines school-based professional development as: team teaching, preparing portfolios, peer coaching, observation/feedback by peer, group visits to other schools, twinning of schools, team work on lesson units, viewing educational videos, reading journals and educational literature.

The Development Appraisal System (DAS), amongst others also focuses on the role of educators in appraising their own performance. Self appraisal suggests transparency of the process and this adds a new dimension to the commonalities found in the definitions of Performance Appraisal which Mathula (2004:4) summarises as follows: it is an on-going process; it is an evaluation of performance; it includes feedback and communication; it allows for performance adjustment or plan of improvement.

Byers and Rue (1994) in Mathula (2004:4) gives a clearer understanding of the term - performance refers to the degree of accomplishment of the tasks that make up an employee's job. According to Parsard (2004:4), the Norms and Standards for Educators policy document (2000) endorses the multiplicity of theories, skills and values that classroom practitioners and managers are to have to function competently in a diverse multicultural society like South Africa. Parsard (2004:5) explains that the purpose of the policy for Norms and Standards for Educators (2000: 17) is to formalise the roles of managers in curriculum change and delivery and outlines the competencies that they will have to acquire for effective curriculum development and delivery as well as performance management in diverse contexts. Such competencies include interpreting needs, researching educational practices and formulating interventions for learners (Policy on Norms and Standards for educators, 2000).

Harris and Lambert (2003:116) concur with the Policy on Norms and Standards for educators by stating that professional development is continuous learning focused on the central goal of making a difference in the lives of diverse students. It is the sum total of formal and informal learning pursued and experienced by the teacher in a compelling environment under conditions of complexity and dynamic change. Working as part of a professional development community helps focus attention on shared purpose and the goals that lead to school improvement (Harris, 2003:116)

A GDE desk calendar on IQMS (2006) presents a description of professional development as “not an event that is separate from one’s day. Rather professional development is an ongoing activity woven into the fabric of every educator’s professional life. It is embedded in a process at developing and evaluating curricular instruction activities and student assessment “(GDE desk calendar, 2006). Professional development is therefore pivotal to the improvement of professional competencies and ultimately to quality teaching and learning. Professional development is infused in all three IQMS components by means of various structures like the SDT, DSG, PGP, SIP and processes like self evaluation, lesson observation in practice, summative evaluation and such like (Collective Agreement No 8 of 2003, ELRC).

Bishop (1977), quoted in a workshop hand out on staff development (Jhb:1990), defines staff development as a complex but necessary professional responsibility, it is a way of relating curriculum needs to staff competencies and programme development; it requires the translation of deficiencies into programme objectives that are affirmative and generative; it focuses attention on the delivery capabilities of all instructional personnel-administrators, supervisors, teachers and other support persons; and it targets the learners to be served and the staff to be directly involved. Snyder and Anderson (1986), quoted in a workshop hand out on staff development (Jhb:1990), adds to this definition by stating that all staff development activities are integrally linked to school goals, to individual staff performance goals, and to the learning process.

While it is important for educators to acquire competencies required for effective curriculum development and delivery, it is just as important that educators receive feedback and recognition for displaying competencies that lead to effective teaching and learning. The Performance Management System (PMS) is a component of IQMS that is intended to fulfil such a function.

2.6 PERFORMANCE MANAGEMENT SYSTEM (PMS)

Bubb and Hoare (2001:3) posit that performance management is a system for reviewing and agreeing priorities within the context of the school development plan. Bubb and Hoare (2001) further state that the main objective of performance management is to improve the match between the offered and the received curriculum. It does this by encouraging schools to support teachers' work as individuals and in teams through the process of setting, agreeing and reviewing school objectives.

The White Paper on Human Resource Management in the Public Service (1997) highlights the importance of the Performance Management System (PMS). The White Paper suggests the following principles to be applied in the implementation of PMS: results orientation; training and development; rewarding good performance; managing poor performance; and openness, fairness and objectivity. This process evaluates individual educators for salary progression, grade progression and affirmation of appointments, rewards and incentives. Progression is determined by the summative evaluation submitted by the DSG while the quality of teaching and learning should be aligned to the benefits mentioned above namely, training and development, rewarding good performance, salary and grade progression and so forth. According to Mathula (4th Educationally Speaking Conference, 2003), PMS is therefore an integral part of an effective Human Resource Management and Development Strategy.

Two new resolutions are bound to have far-reaching consequences for educators in respect of PMS:

Collective Agreement No 3 of 2006 (ELRC, 2006) which establishes norms in terms of which public schools are to be graded. This agreement has implications for principals as the salary level of the principal of a school is determined by the grading of a school, which is done in accordance with the number of educator posts allocated to a school in terms of national norms.

What is of particular concern with regard to the salary progression of principals, is that according to 4.4 of the this agreement, a principal will only qualify for salary progression up to the maximum of his/her salary level. This indicates that if a principal has reached his/her maximum salary level, the incumbent's salary level will only change if the number of educators increases sufficiently for the school to be regarded. Does this mean that the principal in the interim (and in some cases indefinitely), is to be responsible for the implementation of IQMS and a host of other duties without the promise of a salary progression?

Collective Agreement No 5 of 2006 (ELRC,2006) makes provision for qualified post level one educators to progress to salary level 9 without having to be promoted to an available vacant post and for all educators to progress quicker to the maximum of their applicable salary scales.

Paragraph 4.11.5 of this agreement holds some promise that the salary positions of educators on post levels 2 and higher in relation to the improved positions of post level 1 educators will be investigated by a task team. It is hoped that this undertaking becomes a reality in the near future, preferably before irreparable harm is done to the morale of a number of principals who are at the maximum of their applicable salary levels and has no hope of achieving grade progression because the school has reached its maximum growth. The successful implementation of IQMS could be compromised by an agreement that is proving to disadvantage the principal in particular.

Bishop and Snyder & Anderson argued two decades ago that staff development initiatives favour school-based programmes which promote the idea of co-operative whole school development. The concept is firmly entrenched in IQMS in the form of Whole School Evaluation (WSE).

2.7 WHOLE SCHOOL EVALUATION (WSE)

Mathula (2004:5) defines evaluation as the collection, analysis and interpretation of information about any aspect of a programme of education, as part of a recognised process of judging its effectiveness, its efficiency and any other outcomes it may have.

Mathula (2004: 5) includes the following characteristics of evaluation: activities not normally thought of as evaluation can be part of one if so planned; evaluation is not synonymous with assessment, which is a procedure of assigning value to the learning achieved during and at the end of the course; evaluation has three components – data collection, analysis and interpretation; The methods used must be deliberate and recorded if they are to be part of evaluation; and evaluation can also be focused on only a narrow selection of the possible issues provided this is made clear in the reporting and the findings. Hopkins (1989:32) points out that this usually means asking pertinent questions, negotiating the responses and setting out the agreed position. Some of the questions that need to be asked at this stage are: What are you evaluating? Why are you evaluating? When are you evaluating? Who wants the evaluation? How will the evaluation be carried out? How will the evaluation report be used?

One such evaluation process is Whole School Evaluation – a component of IQMS. This evaluation instrument aims to achieve the following: Internal Whole School Evaluation (IWSE) which emphasises educator development and whole school improvement; External Whole School Evaluation (EWSE) encompasses the

moderation of schools; identification and evaluation of school effectiveness; increases the level of accountability; strengthens the support given to schools; provide feedback to all schools and identify aspects of excellence within the system (ELRC, Collective Agreement Number 8 of 2003)

How does the evaluation process comply with the questions - the what, why, who and when raised by Hopkins (1989:32) above? Evaluation procedures, processes and performance standards for institution-based educators are contained in Collective Agreement Number 1 of 2003. The purpose of this agreement is to identify the evaluation procedures, processes and performance standards for institution-based educators. The aim is to: provide a basis for decisions on salary progression, rewards and other measures that require a certain level of performance that may be agreed to; evaluate performance fairly and objectively; to improve the quality of teaching practice and education management (ELRC, Collective Agreement Number 1 of 2003).

It is clear that evaluation plays a pivotal role in the implementation of IQMS. The presence of evaluation is noted not only in WSE in the School Self Evaluation (SSE) and External WSE, but also in DAS as Self Evaluation, the Pre- and Post Evaluation discussions between the Developmental Support Group(DSG) and the educator which takes place during baseline evaluations. As part of Performance Management, summative evaluation features during the annual process of assessing educator performance for pay- and grade progression.

At the Educationally Speaking Conference (2002), Mr Corrie Jordaan, the manager of the Curriculum Provision and Resources Unit and coordinator of the Standards Setting Unit within OFSTED, posits that the thrust of the policy on Whole School Evaluation is to indicate strategies in which highly performing schools need to be recognized and the under-performing schools supported.

Thus, the purpose of WSE is to evaluate the general effectiveness of the school with the nine areas for evaluation being basic functionality of the school; leadership, management and communication; governance and relationships; quality of teaching and learning and educator development; curriculum provision and resources; learner achievement; school safety, security and discipline; school infrastructure and parents and the community. A distinction is made between two types of WSEs: Internal Whole School Evaluation (IWSE) and External Whole School Evaluation (EWSE).

IWSE or School Self Evaluation (SSE) is a continuous process using the WSE guidelines. The school determines, at a given point, the extent to which it is succeeding in attaining its stated aims and objectives in terms of the vision and mission statements. It takes into account the priorities set out and the full range of available resources. The process involves democratically electing a IWSE coordinator, compiling a management plan, training of staff members, establishing sub-committees, carrying out a school self evaluation and instituting monitoring, mentoring and support structures.

EWSE is an external evaluation carried out by a WSE Team including supervisors appointed by the provincial department. EWSE takes place in a three-year cycle for primary schools and five-year cycle for secondary schools. Cyclical external evaluation should also serve to validate findings from the IWSE and will serve to measure progress over the period of the cycle (3 or 5 years). The School Self Evaluation (SSE) and the measuring of progress against the targets for improvement that the school sets itself in the School Improvement Plan (SIP) are evidence of progress that must be taken into account for the external evaluation.

The same instrument will be used by schools for the IWSE (linked to and informed by the process of DAS and PMS) and the EWSE which includes the evaluation of a sample of educators. The improvement of school performance and the quality of

teaching are inter-linked as the professional development of educators and quality teaching and learning are key factors of Whole School Development.

According to Hopkins (1989:32), the role of the evaluator has implications for SMT members. Because of the hierarchical nature of school structures, WSE requires that School Management Team members play a dual role – that of being an evaluator and at another stage, the one whose work is evaluated (ELRC, Resolution 8 of 2003). The complexity of role reversal may impact on the way in which members of the SMT view and implement WSE as part of IQMS. Rej Brijraj of the South African Council of Educators (SACE) appears to support this view in the Sunday Times (27 August 2006 page 5), saying it was essential to review and enhance the role of principals. Brijraj said one of the unintended consequences of the present legislation was that principals were “overwhelmed and overburdened with various kinds of unclarified responsibility”.

2.8 TRENDS AND CHALLENGES IN THE IMPLEMENTATION OF IQMS

The Integrated Quality Management System (IQMS) is meant to be an integrated approach measuring quality. Although quality in itself is difficult to measure, it is possible to measure components or elements thereof using appropriate indicators and instruments and then to make inferences about quality and improvement (NAPTOSA Report: IQMS Colloquium 2006).

This exposition aims to present a brief perspective on some of the trends and challenges emerging from the implementation of IQMS by reflecting on how stakeholders interacted with certain components and elements of the process namely training, understanding of processes/procedures/components, time frames, resources and workloads.

Training in this context was intended to provide educators with guidelines for implementing IQMS. Geysers (National Department of Education: Colloquium

2006) presented the following report: a large number of educators in the greater Gauteng province received training although training only commenced in 2004 because the extent of the implementation process exceeded expectations; the cascade model of training down to districts / union members and then to schools proved time-consuming; the quality of the training sessions was a huge disappointment - they were too brief and this compromised the quality of the training; the trainers conducted sessions in a mechanical way and this impacted negatively on educators' perceptions of IQMS.

At the IQMS colloquium 2006, there were calls for the retraining of educators on certain aspects namely, how the components are integrated; training for educators on how to interact with the performance standards in respect of their Professional Growth Plans (PGP); self evaluation and summative evaluation. A further problem was ascertaining how SBSTs (School Based Support Teams) significantly impact on whole school development and yet many educators do not understand how this concept is meant to function. A commendable point is the fact that provision has been made to train newly appointed educators and those who missed the training in 2004 and 2005 (IQMS Colloquium 2006).

The following aspects have been raised as concerns at the Colloquium 2006: the composition of DSGs – educators choosing friends to be part of the panel. This practise has led to all kinds of irregularities in some schools; educators unable to sit in on DSG deliberations due to time constraints resulting from heavy teaching loads and other responsibilities. The supervision function of members of the SMT must run concurrently with the programme planned by the DSG – this is feasible as the HOD is part of the DSG; in many instances discrepancies were found between the contents of PGPs and the summative evaluation scores. Educators were given high scores for certain performance standards (PS) despite the fact these were noted as areas for development in the PGP. In other cases there was no correlation between scores and learner achievement. The completion of the

PGP therefore is an area that needs to be revisited at district level as the problem emerged in a large number of schools across districts (IQMS Colloquium 2006).

Under-resourced districts lack manpower which makes it difficult to render the necessary support, monitoring and tracking of the IQMS process. Similarly, schools that lack the necessary resources, staff complement and infrastructure are unable to meet the challenges posed by the complexity of IQMS (IQMS Colloquium 2006).

Because of educators' participation in numerous extra—curricular and co-curricular programmes running concurrently with the IQMS process, schools find the time-frames constraining and many educators are hoping that the time frames will be reviewed; the completion and submission of the SIP has raised many challenges. Educators' PGP's inform the SIP which in turn informs the District Improvement Plan (DIP). According to the minutes of a principals' cluster meeting convened on 13/02/2006 by the Johannesburg South district, Ms K Mokubela from the Institutional Development and Support Unit stated that the quality of the School Improvement Plans (SIP) received from schools were disappointing. This can be attributed to the fact that many principals lack a basic understanding of IQMS as the SIP was meant to focus on the nine focus areas of WSE while the PGP's are meant to inform the SIPs. A delegate at the meeting (13/02/2006) pointed out that this lack of a common understanding could have been avoided if schools were provided by a standard template of the SIP at the outset. Districts did not give feedback on the SIPS received, but could have made use of this misunderstanding by giving schools individual feedback on the contents of their SIPS. By doing this schools would gain a clearer understanding of what is expected of them in respect of the SIP (Ibid).

At the IQMS Colloquium in 2006 Ms M Webber, Acting Chief Director of Ekurhuleni West, raised the matter of documentation, stressing that the cumbersome volume of paperwork for schools poses an economic burden (it also

impacts on workloads). Feedback received at the Colloquium 2006 revealed that principals in general have serious reservations about the efficacy of district officials regarding the administration of documents submitted to districts. Very often schools are expected to resubmit documents that have been lost or misplaced at district level.

Another point of concern was that the dates received from districts for intervention programmes/meetings often clashed. This indicates an absence of coordination between different units within a district. In view thereof, districts need to provide schools with the district year plan by September for the following year. Schools can then align their own year plans with that of the district (Ibid).

The matter of salary progression has raised several thorny issues: the dispute between unions and government on the option of automatic payment of salary progression: the dispute arose from the inability of the DoE to effect a smooth implementation of the agreement; at school level, the main focus of the process was reduced to the issue of salary and grade progression. According to the minutes of the meeting between principals and district officials on 13/02/2006, an Ms K Mokubela reminded educators that “the process is not just about receiving money” - she reminded the house that integrity is supposed to be characteristic of an educator. Educators have to be reflective and honest when completing their PGPs. This honesty must also be reflected when DSG’s complete an educator’s summative evaluation which implies that the DSG is making a recommendation for salary/grade progression for the educator concerned (Johannesburg South: Principals’ Cluster meeting 13/02/2006).

A contentious matter is the role of the principal in the IQMS process. At the IQMS Colloquium 2006, several principals made calls for a review of the roles and responsibilities of principals. The question of “should the principal teach?” emerged while reference was made to the workloads of principals as specified in the Personnel Administrative Measures (PAM) in the policy handbook for educators 2003. While some school principals appear to have a good grasp of the

IQMS process, a large majority of educators at this level seem to have difficulty in coming to grips with this complex approach to quality management. Judging by the number of principals who indicated their support for the establishment of a support structure for principals, it would serve the district well to make a concerted effort to establish a network of support structures (IQMS Colloquium 2006). After all, without informed input from the school leader who is responsible for driving the process, effective implementation of IQMS is a misnomer.

According to a report on IQMS presented by Geysers (National Department of Education) at the IQMS Colloquium 2006, the birth of IQMS was to set groundbreaking international trends on integrated performance measurement. However, a key factor to the effectiveness of any policy, is its implementation.

2.9 IMPLEMENTATION THEORY

IQMS can be described as a strategic management process. It is a dynamic, interrelated process. Ehlers and Lazenby (2004:177) in their publication on strategic management based on Southern African concepts and perspectives, cite that strategy implementation is an essential component of the strategic management process as it deals with the strategic change required within an organisation to make the new strategy work to achieve the desired results.

However, putting into practice a set of activities that will change the educational landscape is no mean feat. According to Mathula (2004:6), certain factors are critical to changing practice: the need and nature of the change, the quality and availability of resources; principals' and educators' actions and relations; factors external to the school system – role of government, in particular the local education authority. This will include amongst others expectation and training of principals, educator involvement and time frames (Ibid). The implementation of a quality management system encompasses changes in organisational culture, organisational structures, leadership styles, educator development, monitoring,

control, educator assessment and evaluation, resource allocation, behaviour, performance and reward systems and so forth (Ehlers, 2004:178).

The essential aspects of implementation of a new quality management strategy in schools are the development of educators and whole school development (ELRC, 2003). The objective for the implementation of IQMS is ensuring quality education for all. However, the culture of teaching and learning of an organisation cannot be improved or enhanced until the educators within them are prepared to change. Attitudinal and behavioural changes are therefore essential for effective strategy implementation. Webber, 2006 argues that “changing the hearts and minds of educators remains our biggest challenge in the improvement of the quality of teaching and learning in our schools” (IQMS Colloquium, 2006).

The DoE provided IQMS training to provide educators with guidelines for implementing IQMS. While a large number of educators in the greater Gauteng province received training, the brevity of the training sessions compromised the quality of the IQMS training. To aggravate matters, the trainers conducted sessions in a mechanical way (Webber, 2006 IQMS Colloquium).

Ehlers (2004:180) explain that in order to steer strategy implementation efforts in the right direction, organisations make use of several strategy implementation drivers: strategic change requires strong leadership and adaptive organisational cultures; reward systems form the key for motivating people while organisational structure and resource allocation are structural drivers of strategy implementation (Ibid:180). As organisations evolve, strategies change and the choice of structure must support the chosen strategy. Similarly, the allocation of resources must be aligned to the strategy (Ibid:180).

IQMS was introduced at a time when availability and quality of resources were of concern as a number of schools in this province still face serious shortages in teaching and learner support material while the infrastructure poses challenges to the most enterprising educator (Mathula, 2004:20). Educator actions and relations

are influenced by challenges regarding learner misconduct, negotiations/dispute around automatic pay progression while the continuous rationalization (rightsizing) process impacts negatively on educator morale, destabilizing sound organizational structures and school cultures through the redeployment of excess educators into substantive posts as well as promotions posts (GDE Circular 42/2006).

Also playing a role are factors external to the school system like policy regarding post provisioning for schools: the Morkel Model which determines the educator/learner ratio and the Quintile Ranking formula used to determine the funding of schools according to the poverty index and so forth (ELRC Policy Handbook, 2003). These factors, in addition to the introduction of the National Curriculum Statements (NCS), impact on the way the school is managed by the principal and the rest of the SMT and will therefore have a significant impact on the implementation of IQMS as a result of too many policy innovations.

NAPTOSA's input at the 2006 IQMS Colloquium sums up a holistic view of quality management: education is complex and consists of a large number of interdependent parts. It is not possible to effect a general improvement without considering, and improving, the quality in all the components as well as how the different components relate to one another. Quality in the education system depends on finances and the provision of funds – for infrastructure development, teacher training and the provision of equipment and support materials. Quality depends on good communication and dissemination of information about policy and policy implementation. Quality depends on all employees at whatever level, being confident and competent- and accountable. The point is that every part of the system is dependent on every other part of the system – and the people in it. It therefore makes no sense to focus on improving the quality in only one or two parts of the system... and then expect the whole system to improve (NAPTOSA , 2006 IQMS Colloquium).

The King II Report on Corporate Governance (2002) in Ehlers (2004:179) states that all formulated strategies should be worth implementing, as a strategy chosen

but not implemented, serves hardly any purpose. Similarly, high levels of uncertainty, turbulence and rapid change will render a strategy obsolete in the early stages of implementation (Ibid:178). The NAPTOSA report at the 2006 IQMS Colloquium also referred to the implementation of policy. NAPTOSA contend that South Africa has excellent legislation and policy for education. The problem seems to lie in a commitment to support the implementation of policy. Policies do not implement themselves simply because they are excellent. People make policies happen and people at all levels in the system need to be made competent and confident to implement policy (Ibid). Fullan's view in Mathula (2004:6) is supported by NAPTOSA's statement that the factors affecting implementation function interchangeably as a progression over time and form a network of variables which interact. Fullan (Ibid) argues that if any one or more factors work against implementation, the process will be less effective. The more factors supporting implementation, the more effective it will be.

NAPTOSA's view outlined above is also supported by Ehlers et al (2004:177), who cite that strategy formulation and strategy implementation differ considerably in terms of who takes responsibility for each phase. Strategy implementation is the responsibility of all levels of management, it affects the entire organisation and all employees are participants in the implementation process.

IQMS is a multiple quality management initiative incorporating both strategy formulation and suggested strategy implementation processes.

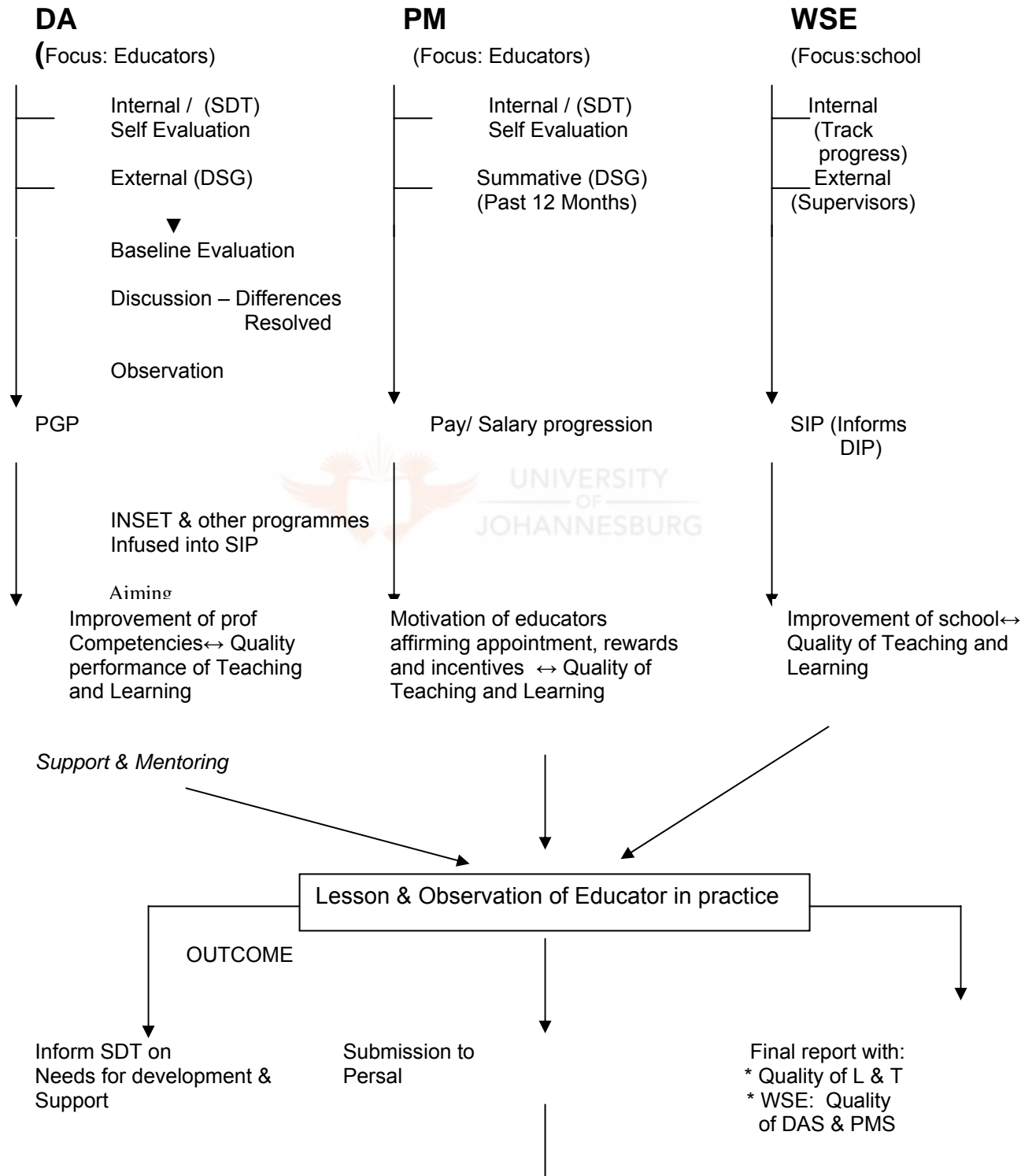
2.10 IMPLEMENTATION OF THE IQMS PROCESS

The implementation process of IQMS includes advocacy, training and planning, self-evaluation by the educator, pre-evaluation discussion with the Developmental Support Group (DSG), classroom observation, evaluation in respect of the other Performance Standards outside classroom observation, feedback and discussion, resolution of differences and/or grievances, monitoring, moderation, procedure for

second and subsequent years of implementation and procedure in the year of EWSE.

The flow-chart below depicts the implementation of the IQMS process:

Figure 2.2 IQMS: THE IMPLEMENTATION PROCESS



(Principal ensures fairness & Accuracy)

Adapted from: IQMS Handout, 2006, GDE

Figure 2.2 above presents the three IQMS components and their respective processes. The diagram also illustrates the interrelatedness of the three components and how WSE is not only linked to, but is also informed by the processes of DAS and PMS. The improvement of school performance and the quality of teaching are closely inter-linked. The diagram also illustrates how the lesson and observation of educator in practice process informs the need for development and support, informs the summative evaluation and influences the quality of teaching and learning as well as the quality of DAS and PMS.

2.11 SCHOOL LEADERSHIP AND IQMS IN GAUTENG SCHOOLS

The researcher seeks to develop an understanding of the impact that IQMS has on school leadership. School leaders in this study refers to all educators who occupy a leadership position in the school environment (SMTs).

It is widely acknowledged that there is a multitude of definitions available on leadership. Because IQMS is a reform process, the researcher prefers the definition provided by Cuban (1988) in Bush (2003:8) as the definition links leadership with change " By leadership, I mean influencing others' actions in achieving desirable ends. Leaders are people who shape the goals, motivations, and actions of others."

The integrative leadership models developed by Enderud (1980), and Davies (1983) incorporate ambiguity, political, collegial and formal perspectives (Bush, 2003:193). The ambiguity phase - the anarchic phase identify attempts to identify issues and facilitates a sifting process. The political phase provides opportunity for bargaining and negotiations. In the collegial phase, participants in agreement with the procedures and solutions brainstormed during the political phase,

persuade less enthusiastic members to agree on a compromise. The formal phase allows for modifications to facilitate effective administration.

The integrative models outlined above fits in well with the consultative and transparent nature of the IQMS process. While the four-phases may become time consuming, the complex nature of IQMS as well as people's natural apathy towards change, require adequate time for deliberation in order for consensus to be reached. The main limitation of this model is that it is a laborious process that may impact on the already heavy workload of school leaders caused by the introduction of countless innovations in the past.

Numerous quality management approaches have been implemented at schools over the years to support the culture of teaching and learning. With the introduction of each approach, school leadership has been faced with the challenge of developing strategies to cope with the demands posed by these quality assurance and quality management initiatives.

According to Murphy (1994:94), principals in restructuring schools seem to be working in an increasingly turbulent policy environment. The educational system is becoming more complex, public expectations have risen and the number of players have expanded concomitantly. Murphy (Ibid) further argues that no sooner had principals begun to respond to a massive set of reform proposals on school effectiveness than they are "bombarded with a plethora of new initiatives grounded in rediscovered concepts of learning and reframed views of leadership, organisation and governance". As a principal at a primary school in Gauteng, the researcher supports this sentiment as a reality of her task in managing a school.

The most recently launched policy innovation for South African schools is the Integrated Quality Management System (ELRC, Resolution 8 of 2003). IQMS is being presented as a tool to enhance the delivery process of quality education for all South Africans. The tenets of IQMS are underpinned by the purposes of quality management systems which are to determine competence; to ensure growth; to

promote accountability and to monitor the overall effectiveness of an institution. Bearing the above in mind, I agree with Sybout and Wendel (in Reddy, 1999: 4-5) when they argue that one of the most significant challenges facing leadership is the range of expectations placed on the school leader. They posit that the expectations have moved from demands of management and control to the demands for an educational leader who can foster and promote staff development, effective organisational structures, parental involvement, community support and learner growth.

The complex role of the School Management Team (SMT) and the overlapping nature of the tasks that school leadership are responsible for in respect of IQMS, creates a tremendous challenge at a time when South African schools are inundated with policy changes as outlined in the ELRC Policy Handbook for educators 2003, namely the language policy, financial management, curriculum implementation, school governance, rationalisation of educators as well as public service staff, Learning and Teaching Support Material (LTSM) issues, National Protocol on Assessment; School Safety and Security; Funding of schools and many more (Ibid).

Resolution 8 of 2003 of the ELRC makes it the responsibility of the SMT to ensure that the school is operating efficiently and effectively. The principal is also required to be part of the Staff Development Team (SDT). Moreover, the principal has to verify that the specific and overall ratings of educators being submitted to the Department of Education as well as to ensure the fairness and consistency of all submissions.

In addition to being the key role player in the implementation of IQMS, the principal is also required to teach. The implication of this is that Performance Standards for Classroom Observation (CO) will be applied in order for the school head to earn a rating in this area. Moreover, the school head invariably becomes part of a DSG - educators who are based at a particular school for a long period believe that the

principal is best placed to develop them and to make any meaningful and justified input regarding their summative evaluation.

However, it is essential that this fact is stressed: the principal is the key role player with regard to school improvement and in effect, promoting quality teaching and learning. At the 8th International Conference of EMASA in 2005, Dr Martin Prew presented a study on how principals managed change in ninety six schools in Soshanguve. His research led him to conclude that principals are key to school improvement. Dr Prew quote the example of two successful principals who seized on innovations they were exposed to and made them work for their schools.

2.12 CONCLUSION

The proposed IQMS model for quality management in schools could hold significant benefits for learners, educators and schools alike. But the tremendous challenges inherent in IQMS and the fact that the principal is ultimately responsible for ensuring implementation of this expansive system amidst a plethora of policy innovations that raises concern. It is therefore necessary to ascertain how practicable IQMS is in the current management paradigm and what kind of support should be available to the principal (at district level and from the DoE at large). To ensure the successful implementation of IQMS, it is vital to create an enabling environment so that the principal's function as leader of the institution is truly one of quality management.

CHAPTER 3: DESIGN OF THE RESEARCH INSTRUMENT AND EMPIRICAL INVESTIGATION

3.1 INTRODUCTION

This chapter outlines the research methodology used in this study. After a brief outline of the research design, the procedures and investigative processes will be explored.

3.2 THE RESEARCH DESIGN

According to Mouton (2001:74), a research design can be defined as a plan or blueprint of how one intends conducting the research. Mouton explains that a research design focuses on the end product (research findings), formulates a research problem and focuses on the logic of the research.

The purpose of this study is to understand and report on the perceptions of a sample of educators on the impact of the Integrated Quality Management System for educators and school leadership. The findings from the sample will be used to make inferences about the population of schools in Gauteng.

The researcher has decided on the quantitative research method in order to utilise the questionnaire as a research instrument for this study.

3.3 QUANTITATIVE RESEARCH

Quantitative research is a form of conclusive research involving large representative samples and fairly structured data collection procedures. According to Struwig (2001:4) the researcher must specify what the constructs are and how

the constructs will be measured. Quantitative research tends to measure constructs through the use of questionnaires and/or some form of structured observation.

Two sets of variables are identified. The researcher manipulates one or more independent variables to determine whether or not these manipulations cause an outcome in the dependent variable (Creswell, 1994:117). Deductive reasoning is fundamental to quantitative research. The researcher should be able to move from general kinds of statements to particular ones. According to Creswell (1994:18) and Struwig (2001:5), the main principle underlying deductive reasoning is that generalisations or theories which emanate from the sample may be applicable to a large number of cases or situations about some characteristics, attitudes or behaviour of the population.

A primary role of quantitative research is to test hypotheses. A hypothesis is a proposition regarding the relationship between two or more variables (Struwig, 2001:4). A statistical hypothesis usually postulates the opposite of what the researcher predicts or expects. In this form it is known as the null hypothesis and is represented by the symbol H_0 . The alternative hypothesis is presented by the symbol H_a which may indicate for example, that there is a statistically significant difference between the mean scores of male and female principals with regard to the impact of IQMS on school leadership.

3.4 DATA COLLECTION

The choice of data collection methods for the researcher working from a quantitative approach can be categorised into questionnaires, checklists, indexes and scales. In this research, the focus will be on the questionnaire as a method of data collection.

3.4.1 Design of the questionnaire

To guide the empirical study of this research, a structured questionnaire was used to collect data from respondents. A questionnaire is defined by De Vos (1998:152) as a set of questions in a form to be completed by respondents in respect of a research project. The aim of this questionnaire was to gauge the perceptions that educators have in relation to the implementation and impact of IQMS – in particular on school leadership. Close - ended questions were largely utilised to represent the crucial issues around the implementation of IQMS. Response scales included Yes/No categories and Likert-type scales relating to the measure of extent of responses.

3.4.2 Composition of the questionnaire

The questionnaire consists of four sections covering thirty nine close-ended items. The responses were largely limited to options presented on an “equal interval” Likert- type scale. The questionnaire consisted of items that are indicators of the subject under review which is the impact of the Integrated Quality Management System.

There are four sections to the questionnaire and each consists of questions which serve as indicators of the contextual factors relative to the implementation of IQMS. Hereunder follows a summary of the contents of each section:

Section A: This section consisted of ten questions and contained the biographical details of respondents namely mother tongue, gender, union affiliation, teaching experience, current post. The biographical details will function as independent variables to test hypotheses relating to the implementation of IQMS and its impact on school leadership.

Section B: Thirteen questions were posed to establish contentious issues around IQMS training; whether educators understand the principles relative to IQMS; how IQMS will affect schooling and educator workloads.

Section C: The eleven questions used were applicable to WSE to obtain educator perspective on WSE in relation to educator turnover and whether WSE serves as a tool to determine resources at a school.

Section D: Eight contextual items were used to probe educator opinion on issues around management and appraisal with the emphasis on educator development and DSGs.

As mentioned earlier, for the most part the responses of educators had to be indicated on a Likert-type scale to ascertain to what extent educators perceived IQMS to impact on the workloads of educators and in particular school leadership.

Example:

Statement/Question: Educators have sufficient time to serve on DSGs.

To no extent	1	2	3	4	5	To a large extent
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If the respondent selects option 5, this would mean that the respondent believes to a large extent that educators have sufficient time to serve on DSGs. Option 3 would indicate a moderate option.

Before embarking on the administration of the questionnaire, it is necessary to give a brief exposition of sampling techniques.

3.5 SAMPLING TECHNIQUE

Babbie and Mouton (2001:164) write that sampling is the process of selecting observations. Bless and Higson-Smith(1995: 88) state that sampling theory is a technical accounting device to rationalise the collection of information, to choose in a restricted way the restricted set of objects, persons, events and so forth from which the actual information will be drawn. It is crucial that the sample is selected in such a way that it is possible to generalise the results obtained from a sample to the whole population (Ibid).

3.5.1 Rationale for the sampling technique

For the purpose of this study the researcher decided on stratified random sampling. According to De Vos (2002:205), stratified random sampling is suitable for heterogeneous populations because the inclusion of small subgroups percentage-wise can be ensured.

According to Mouton (2001:191) the ultimate function of stratification is to organise the population into homogeneous subsets and to select the appropriate number of elements from each. Bless et al (1995: 91) posit that the principle of stratified random sampling is to divide a population into different groups, called strata, so that each element of the population belongs to one and only one stratum. Then within each stratum, random sampling is performed using either the simple or the interval sampling method. Babbie (2005:223) agrees that in general, stratified sampling produces samples that are more representative of the population than simple random sampling if the stratum information is accurate.

In this study, the population consists of schools in the GDE. The members of the population are homogeneous with regard to some characteristics such as gender, age, post status, primary/secondary schools, teaching experience and home language.

Bless et al (1995:89) argue that the first means of ensuring a representative sample is the use of a complete and correct sampling frame, which is the list of all units from which the sample is to be drawn.

The sampling frame for this study was compiled as follows:

Former Education Departments then known as DET, HOD, HOR and TED were listed according to primary and secondary schools within each district of GDE. The researcher ensured that the subgroups (Ex Departments) were selected proportionately, based on representation within GDE. This ensured larger samples from larger strata, and smaller samples from smaller strata. Selection within the different strata occurred randomly. De Vos (2002:205) refers to this as proportionate stratification.

The Interval sampling method within the different strata was used to select schools. In one instance, the Ex - HOD proportionately did not constitute even one school. However, to ensure complete representivity of the population, one school from this group was added to the sample. In some instances, the intervals in the sampling frame had to be manipulated by the researcher. This was done to ensure that every school included in the sample represents a minimum staff establishment of ten educators to include all levels of educators at the school.

Composition of the sample :

Number of schools selected (in proportion to the Ex Departments):

Primary = 35; Secondary = 16; Total = 51

Number of respondents per school = 10

(Principal, Deputy Principal, 3 Heads of Departments, 5 educators)

Total number of respondents = 510

Districts = 5

3.5.2 The administration of the questionnaire

Five hundred and ten questionnaires were distributed to 51 schools in five districts selected in Gauteng. The researcher chose to have questionnaires hand-delivered to respondents. Completed questionnaires were collected at an arranged time to allow for respondents to complete the questionnaires at their leisure.

The entire process of distribution and collection took six weeks. Of the 510 questionnaires distributed, 355 were returned and this represents a return rate of 71%, which is regarded as a good return rate which contributes to the validity of this study.

Following hereunder is a discussion on the biographical and general information of the respondents.

3.6 ITEMS ASSOCIATED WITH FOUR SECTIONS OF THE QUESTIONNAIRE

3.6.1 Items associated with biographical/general data on the respondents of the study (Section A)

The following tables on the biographical data provide examples of the extent of representivity of the sample used in Gauteng.

TABLE 3.1 MOTHER TONGUE

This question initially consisted of fifteen groups. For the purpose of describing the responses, it was more convenient to work with a reduced number of categories. To this end it was possible to reduce the categories to four groups: Afrikaans, English, Sotho and Nguni.

Response	Frequency	Percentage
Afrikaans	87	24.5
English	102	28.7
Sotho	65	18.3
Nguni	56	15.8
Missing System	45	12.7
Total	355	100.0

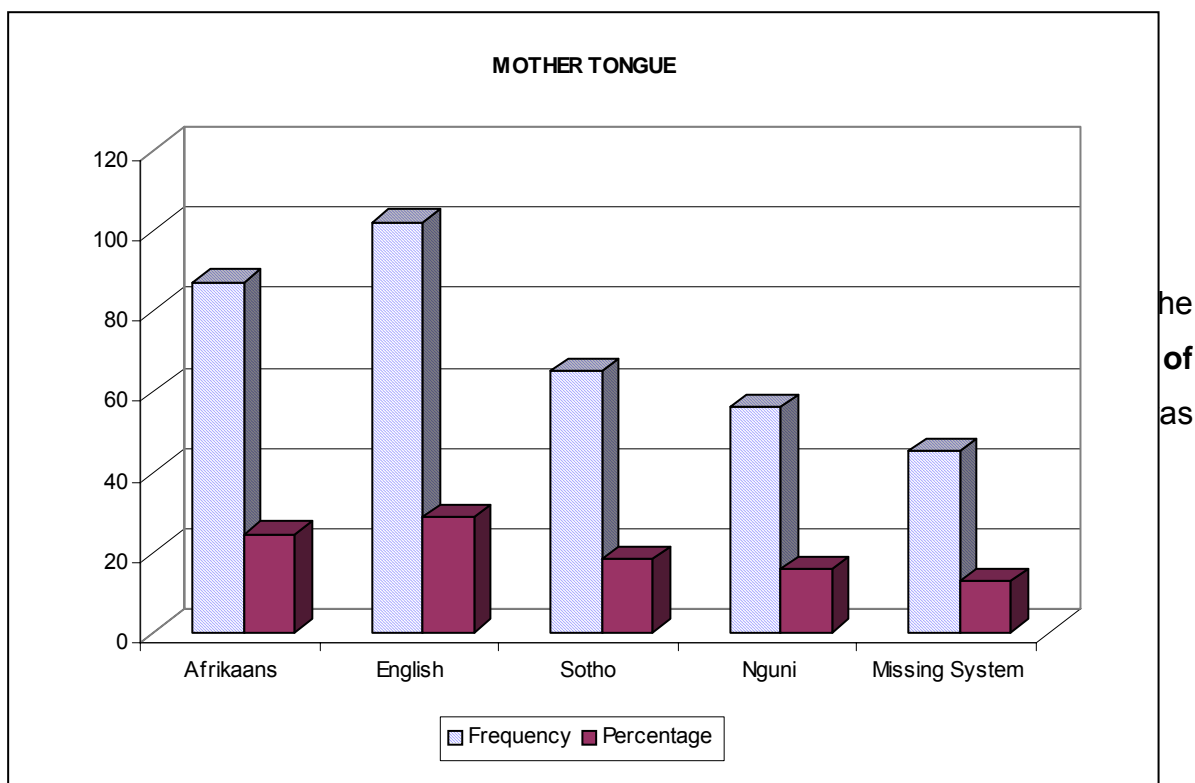


Figure 3.1. Frequency / Percentage: Mother tongue

Figure 3.1 presents a histogram of the frequencies and percentages for each language group. The graph illustrates that the largest number of respondents were from the English language group (28.7%). The Nguni language group constituted the smallest number of respondents (15.8%).

TABLE 3.2 GENDER

Response	Frequency	Percentage
Female	217	61.1
Male	109	30.7
Missing System	29	8.2
Total	355	100.0

The responses in Table 3.2 indicate that there were approximately 2 female respondents to every male respondent.

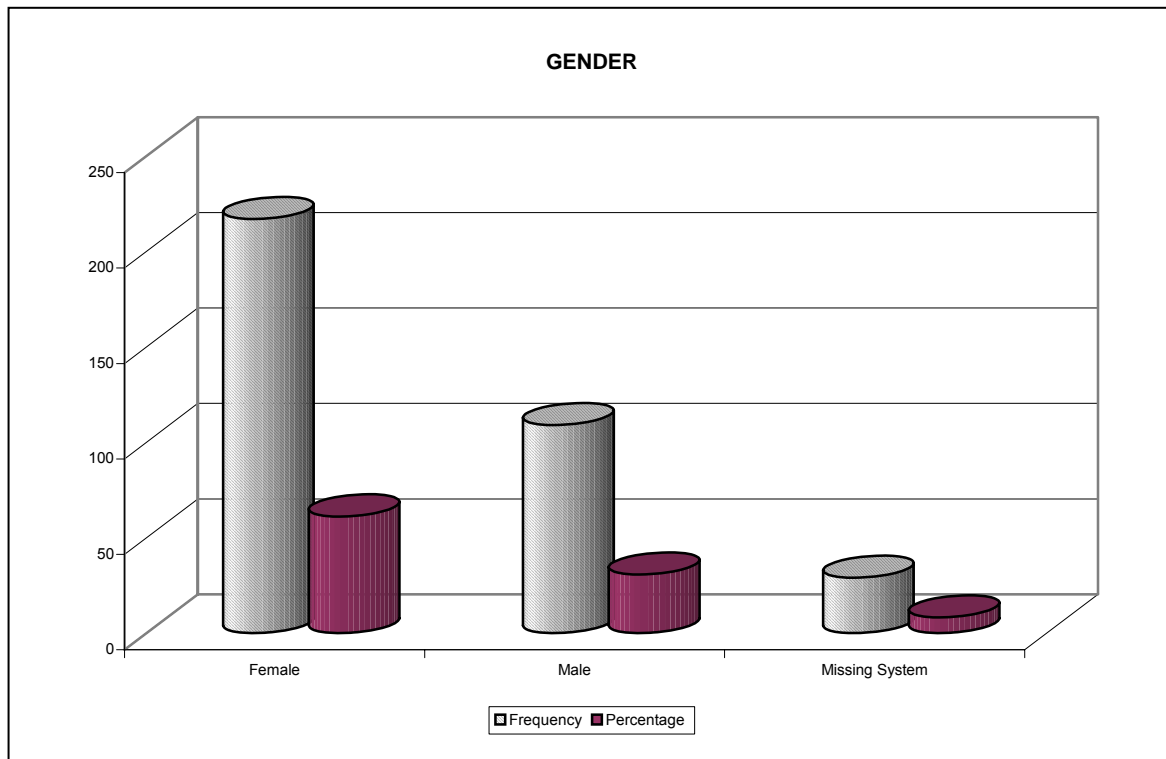


Figure 3.2 Frequencies and percentages for male and females.

The largest number (61.1%) of respondents were female while 30.7% of the respondents were male.

TABLE 3.3 EMPLOYEE ORGANISATION

Response	Frequency	Percentage
Other	145	40.8
SADTU	183	92.4
Missing System	27	7.6
Total	355	100.0

This question initially consisted of four categories. Because of the large number of SADTU affiliates, it seemed plausible to collapse the NAPTOSA, SAOU and OTHER into one category thus reducing the categories from four to two groups.

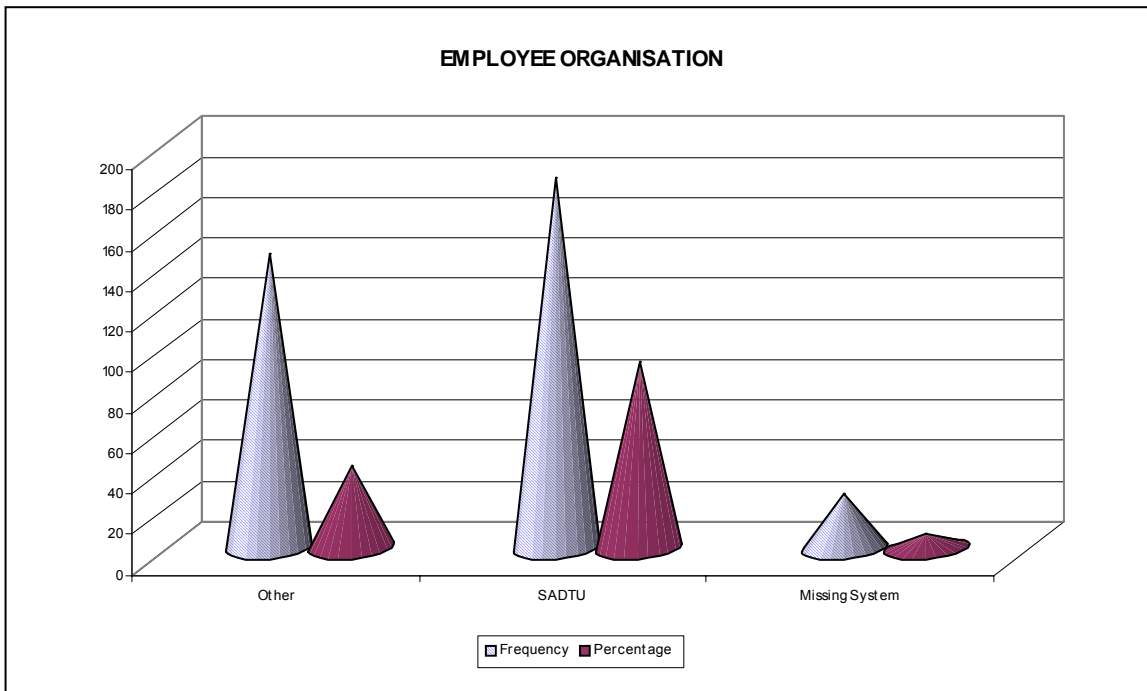
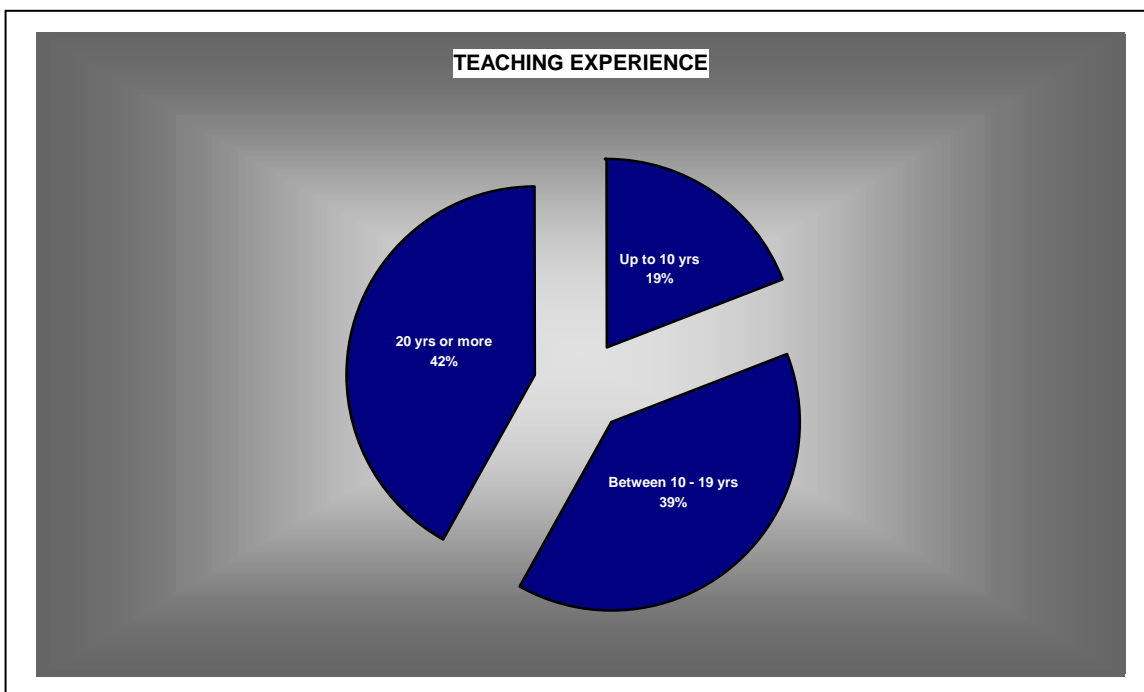


Figure 3.4. Frequency / Percentage: Employee Organisations

According to figure 3.4, the highest percentage (92.4%) respondents belong to SADTU. The rest of the organisations NAPTOSA, SAOU and OTHER combined constitute the “other” and represents 40.8% of the respondents.

TABLE 3.4 TEACHING EXPERIENCE

Response	Frequency	Percentage
Up to 10 years	65	19.2
Between 10-19 yrs	132	38.9
20 years or more	142	41.9
Total	339	100.0



The responses in Table 3.4 and figure 3.5 indicate that 41.9% of the respondents have 20 years or more teaching experience; 19.2 % have 10 years or less teaching experience; 38.9% of the respondents have 10 to 19 years teaching experience while 41.9% of the respondents have 20 years or more teaching experience. According to a publication by the Matthew Goniwe School of Leadership and Governance (MGSLG) 2006: *A School Leadership Profile of the GD*, , the level of teaching experience of SMTs should be considered when designing training programmes. The motivation forwarded for this suggestion is

that it does not make sense to train a newly appointed principal in the same way as one would do for a principal who has been in a post for 20 years. School management plays a pivotal role in the implementation of IQMS. In light thereof, it would make sense to divide training programmes into categories for the benefit of beginners as well as established SMT members.

TABLE 3.5 POST LEVEL

Responses	Frequency	Percentage
Principal	34	9.6
Deputy Principal	34	9.6
Head of Department	97	27.3
Educator	189	53.2
Missing System	1	3
Total	355	100.0

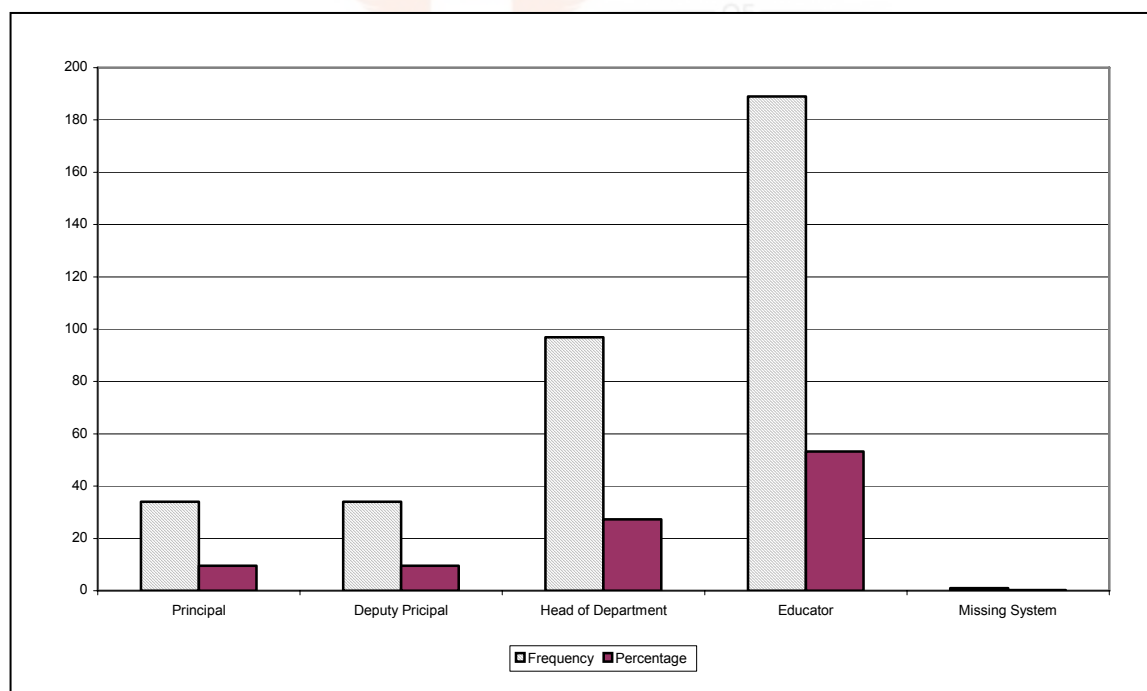


Figure 3.6. Frequency / Percentage: Post levels

The responses in table 3.5 and figure 3.6 indicate that there were approximately 1 educator to every promotion post holder amongst the respondents. The selection of the sample per school was designed to include an even number of SMT members and educators. The researcher's intention was to capture the responses of educators on every post level. The percentages of the sample are proportionally similar to the school organisational structures.

TABLE 3.6 THE NATURE OF THE SCHOOL

Responses	Frequency	Percentage
Primary	218	64.1
Secondary	122	35.9
Missing Combination	15	4.2
Total	355	100.0

Table 3.6 indicate that 64.1% of respondents were from Primary Schools while 35.9% were from Secondary schools. This ratio corresponds with Gauteng Department of Education's statistics of approximately 2 primary schools to every high school in Gauteng (GDE: Annual School Survey Data Base 2004, Jhb.)

TABLE 3.7 NUMBER OF LEARNERS

Responses	Frequency	Percentage
Fewer than 700 learners	116	32.7
710 to 1000 learners	93	26.2
More than a thousand learners	146	41.1
Total	355	100.0

The responses in Table 3.7 indicate that the biggest group of respondents were from schools with more than a thousand learners. Because some of the schools were combined schools (catering for grades ranging from 1 to 12), which have on average larger numbers of learners, the sample included a bigger number of schools with more than a thousand learners.

TABLE 3.8 DISTRICT OF EMPLOYMENT

Responses	Frequency	Percentage
Johannesburg North	59	16.6
Johannesburg South	159	44.8
Johannesburg West	30	8.5
Sedibeng East	107	30.1
Total	355	100.0

The responses in table 3.8 indicate that the sample comprised of a large number of respondents from the Johannesburg South District. Schools in Johannesburg South were more accessible to the researcher who is employed in this district. This district is one of the Mega Districts in Gauteng. The high response rate of responses from Johannesburg South could be attributed to the size of the district.

TABLE 3.9 EDUCATORS FACILITATING LEARNING AREAS (LA)

Responses	Frequency	Percentage
Languages	192	54.1
Mathematics	135	38.8
Natural Science	85	23.9
Human and Social Science	90	25.4
Economic and Management Science	72	20.3
Arts and Culture	68	19.2
Life Orientation	127	35.8

The responses in Table 3.9 indicate that the sample comprised of a large number of respondents from the Languages category. This group consists of various languages and various levels of a particular language. The response is consistent with expectation that more educators are facilitating languages than other learning areas.

TABLE 3.10: NUMBER OF D*SGs INVOLVED IN

Responses	Frequency	Percentage
None	47	13.2
One	94	26.5
Two	56	15.8
Three	41	11.5
Four or more	94	26.5
Missing System	23	6.5
Total	355	100.0

The responses in Table 3.10 indicate that the sample comprised of more respondents who are involved in two categories, one or four or more DSGs. A possible explanation could be the fact that Heads of Departments - as Learning Area Specialist, are usually involved in more DSGs because they are responsible for more learning areas. On the other hand, it is quite possible that senior management are involved in just one DSG as they do not generally perform the function of curriculum implementation. Most educators will also serve on just one DSG since their heavy teaching loads make it difficult for them to serve on more than one.

TABLE 3.11: TRAINING FOR IQMS

The analysis indicated in the following table relate to the question on whether the respondent received training for IQMS.

Responses	Frequency	Percentage
Yes	333	93.8
No	8	2.3
Missing system	14	3.9
Total	355	100.0

The responses in Table 3.11 indicate that a large number of educators (93.8%) have received training in IQMS.

TABLE 3.12: DATE OF TRAINING

Responses	Frequency	Percentage
January 2004 to March 2004	37	10.4
April 2004 to June 2004	30	8.5
July 2004 to September 2004	59	16.6
October 2004 to December 2004	87	24.5
Since January 2005	119	33.5
Missing system	23	6.5

The responses in Table 3.12 indicate that most of the educators were trained between January 2004 and December 2004 while the rest were trained since January 2005. Data shows that 93.8% of respondents have been trained as at May 2005 when this study was conducted.

TABLE 3.13: DURATION OF TRAINING

Responses	Frequency	Percentage
Half a day	131	36.9
One day	172	48.5
2 to 3 days	25	7.0
4 days or longer	17	4.8
Missing system	10	2.8

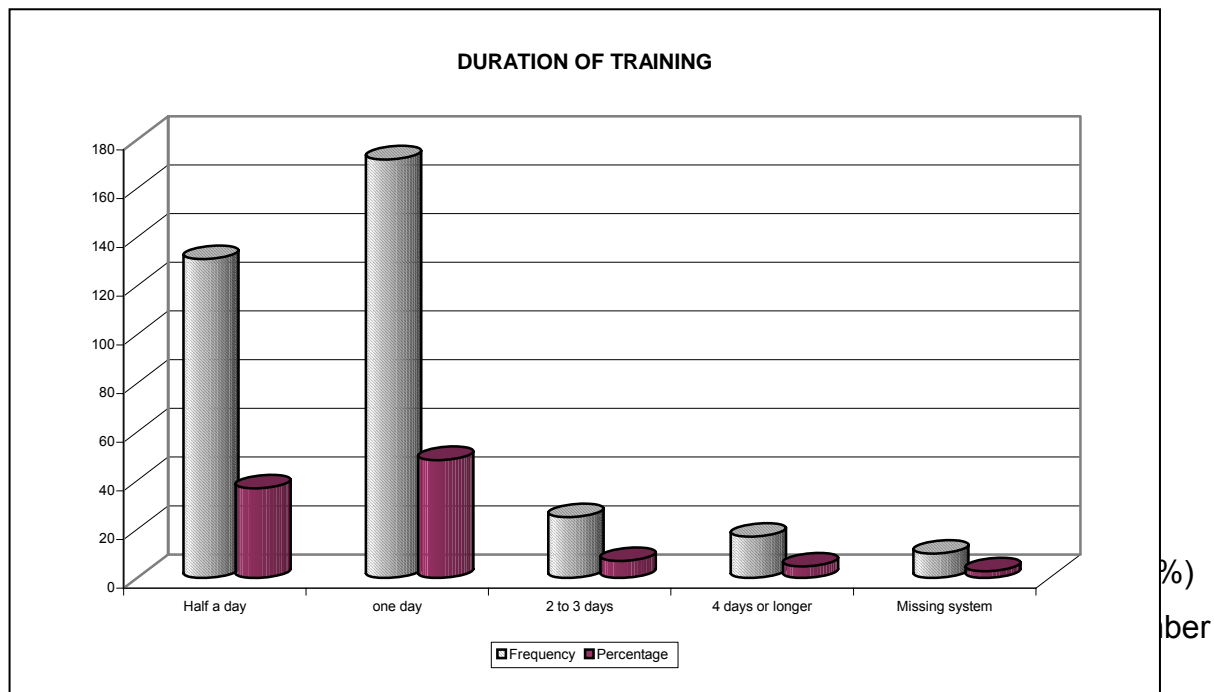


Figure 3.7 Frequency and percentage: Duration and training

According to table 3.13 and figure 3.7, the large majority of respondents (85.4%) were trained for the duration of one day and less. The training for a large number of respondents (48.5%) lasted for the duration of a day while 36.9% were trained for half a day. This evidence is a matter of concern in view of the complexity of the IQMS process. The training should have run over a much

longer period to provide sufficient discussion time for issues/problems that could be expected to surface during the implementation of the process.

TABLE 3.14: PLACE OF IQMS TRAINING

Responses	Frequency	Percentage
At my school	128	36.1
At a neighbouring school	192	54.1
At another venue outside my district	24	6.8
Missing system	11	3.1

The responses in Table 3.14 indicate that a large number of respondents were trained at their own schools (36.1%) while the majority (54.1%) received training at a neighbouring school. This data suggests that the DoE may have endeavoured to contextualise training or that schools were clustered in terms of proximity.

TABLE 3.15: HAS THE PRINCIPAL RECEIVED IQMS TRAINING?

Responses	Frequency	Percentage
Yes	47	92.2
Do not know	4	7.8
Total	51	100.0

The responses in Table 3.15 indicate that most principals at schools where this study was conducted received training.

TABLE 3.16: HAS YOUR SCHOOL UNDERGONE WSE?

Responses	Frequency (Schools)	Percentage
Yes	13	25.5
No	34	66.7
Missing system	4	7.8
Total	51	100.0

The responses in Table 3.16 indicate that 13 schools have been involved in WSE. 66.7% of the schools in the sample have not been involved in WSE.

TABLE 3.17: SCHOOLS RECEIVED A REPORT AT THE END OF WSE ?

Responses	Frequency	Percentage
Yes	11	23.4
No	2	4.3
Total	13	27.7
Do not know	34	72.3
Total	47	100.0

The responses in Table 3.17 indicate that data for questions 2 and 3 are affected due to uncertainty about question 1. Of the 13 respondents who responded positively to Cq1, 11 indicated that the school received a report after WSE. This data suggests that schools who undergo WSE generally do receive a report at the end of the evaluation period.

3.6.2 Items associated with Section B of the questionnaire

Arranging the items in a table according to the way respondents answered Section B can possibly shed further light on the perceptions of educators regarding the implementation of IQMS.

TABLE 3.18: ITEMS IN SECTION B ACCORDING TO MEAN SCORES

Item	Description	Mean Score	Rank Order
B13	IQMS will result /has resulted in an increase in your workload	3.77	1
B7	The purpose of IQMS	3.49	2
B9	The procedure to be followed n IQMS	3.35	3
B8	The processes of IQMS	3.31	4
B12	IQMS will improve the quality of schooling	3.23	5
B11	IQMS will result in principals becoming more accountable leaders	3.28	6
B10	The training you received has prepared you for implementing IQMS	2.79	7
	Average	3.31	

According to Table 3.18 the mean scores of the items range from 3.77 to 2.79. This indicates that the respondents have a moderate understanding of IQMS in general. B13 with a mean score of 3.77 is ranked the highest, suggesting that the general perception amongst educators is that IQMS will result or has resulted in an increase in their workloads. The mean score for B10 (2.79) suggests that while respondents appear to understand the IQMS process in principle, they believe that they are not sufficiently prepared for the practical implementation of the process.

TABLE 3.19: ITEMS IN SECTION B SHOWING THE DISTRIBUTION OF RESPONSES ON A 3- POINT SCALE

Rank	Item	1	%	2	%	3	%	Total
1	B13	46	12.9	74	21.0	217	61.1	337
2	B7	45	12.7	129	36.3	168	47.3	342
3	B9	64	18.0	129	36.3	148	41.7	341
4	B8	64	18.0	132	37.2	145	40.8	341
5	B12	74	21.0	122	34.4	141	39.7	337
6	B11	74	21.0	112	31.5	152	42.8	338
7	B10	139	39.0	125	35.2	78	21.9	342

It is evident from Table 3.19 that 61.1% of respondents have the perception that IQMS will cause an increase in their workloads. Senior management in particular, in addition to their teaching loads, will have to assume more responsibility: HODs in terms of being part of a number of DSGs as well as their normal supervisory function; Deputy Principals as part of DSGs, their involvement in the School Development Team (SDT) and in some cases assume the role of external WSE coordinator; Principals play a pivotal role in the IQMS process. They are responsible for ensuring amongst others that the implementation process is on track, the IQMS management plan is adhered to, educators who have not been trained in IQMS, are trained internally, the School Improvement Plan (SIP) is submitted to the district office and implemented, functions as internal moderator and submits educators' evaluation scores to the district offices. The principal is required to teach, thus has to be developed and evaluated by his/her DSG. Usually the IDSO (Institutional Development Support Officer) serves on the panel.

It has to be mentioned that the duties and responsibilities of the SMT in respect of the day-to-day functioning of the school are numerous – especially in the case of public schools that cannot afford to employ additional staff. Additional staff help to spread the many functions in respect of financial management, administration of official statistics, control of LTSM, repairs and maintenance of resources, school safety measures, extra-curricular duties and a host of other duties.

While a large percentage of respondents (ranging from 47.3% to 40.8%) for items B7, B8 and B9 responded positively in respect of their understanding of IQMS. A significant number (39.0%) of respondents tend to be negative with regard to the adequacy of the training they received.

3.6.3 Items associated with Section C of the questionnaire

Arranging the items in a table according to the way respondents answered Section C will provide an understanding of the perceptions of educators regarding the implementation of WSE.

TABLE 3.20: ITEMS IN SECTION C (WSE) ACCORDING TO MEAN SCORES

Questions 2 and 3 are not present due to uncertainty about question 1

Item	Description	Mean Score	Rank Order
C6	WSE serves as a tool to determine resource needs at a school	3.29	1
C5	Educator turnover disrupts WSE	3.08	2
C4	WSE is judgmental by nature	3.04	3
C7	WSE results in more resources being allocated to a school	2.48	4
	Average	2.97	

The mean scores of the items in Table 3.20 range from 2.48 to 3.29. Items C5 (3.08) and C4 (3.04) are ranked 2nd and 3rd respectively – a moderate rating which may suggest a conservative response to a question respondents are not certain of. An average mean score of 2.97 tending strongly towards 3 also imply that respondents opted for a moderate score. This preference for a neutral option could suggest that respondents are still undecided about what to expect from the WSE process. While the advocacy and training in IQMS may have been adequate, responses appear to reflect a “wait and see” approach. Moreover, at the time of the survey, a large number of schools had not made much progress with the implementation of WSE. Thus educators would not be in a position to give informed input with regard to the WSE process.

TABLE 3.21: ITEMS IN SECTION C SHOWING THE DISTRIBUTION OF RESPONSES ON A 3- POINT SCALE

Rank	Item	1	%	2	%	3	%	Total
1	C6	63	17.7	127	35.8	132	37.2	322
2	C5	87	24.5	124	34.9	105	29.6	316
3	C4	86	24.2	135	38.0	101	28.5	322
4	C7	160	45.1	115	32.4	47	13.2	322

Although a fair percentage (37.2%) of respondents believe that WSE determines resource needs at a school (C6), a significant number of respondents (45.1%), do not believe that WSE results in more resources being allocated to a school. This data could infer that educators are sceptical about promises made by GDE. Some of the schools had at the time of this survey undergone WSE and it is likely that no resources have been allocated despite schools being in urgent need of specific resources. This state of affairs is unfortunate – if service delivery is the yardstick by which educators are going to be measured, then it is only fair that the DoE make every effort to honour its end of the bargain. Only in this way will IQMS - in

fact any quality assurance instrument, enjoy any measure of credibility amongst the stakeholders at grassroots – the educators.

3.6.4 Items associated with Section D of the questionnaire

Arranging the items in a table according to the way respondents answered Section D can possibly gauge the perceptions of educators regarding the management and appraisal of educators.

TABLE 3.22: ITEMS IN SECTION D ACCORDING TO MEAN SCORES

Item	Description	Mean Score	Rank Order
D1	Lesson observation is necessary for educator development	3.75	1
D5	Annual educator evaluation will contribute to professional growth	3.40	2
D2	DSGs contribute to educator development	3.34	3
D4	All educators should be required to serve on a DSG	2.99	4
D3	Educators have sufficient time to serve on DSGs	2.09	5
	Average	3.11	

The mean scores in Table 3.22 range from 2.09 to 3.75. The highest ranking is enjoyed by item D1 (3.75) implying that many educators believe that lesson observation is necessary for educator development. Because D4 (2.99) is ranked higher than D3 (2.09), this could suggest that while respondents believe that all educators should serve on DSGs, there is the perception that educators do not have sufficient time to serve on DSGs. Most educators at public schools have few if any non - teaching periods which they can utilise to serve on DSGs.

TABLE 3.23: ITEMS IN SECTION D SHOWING THE DISTRIBUTION OF RESPONSES ON A 3 POINT SCALE

Rank	Item	1	%	2	%	3	%	Total
1	D1	36	10.1	94	26.5	214	60.3	344
2	D5	71	20.0	98	27.6	174	49.0	343
3	D2	54	15.2	134	37.7	153	43.1	341
4	D4	110	30.9	122	34.4	111	31.3	343
5	D3	234	65.9	78	21.9	31	8.7	343

According to Table 3.23, 65.9% of the sample agrees that educators do not have sufficient time to serve on DSGs (D3) while 65.7% agree to a moderate and large extent that all educators should be required to serve on a DSG (D4). This data implies that educators in general are in favour of serving on DSGs provided that they have enough time to do justice to this function. Serving on the DSG of a peer gives an educator the opportunity to be part of a panel that views educators' development from various perspectives and in addition make input. This kind of exposure benefits both groups of participants – the appraisee and appraiser in terms of personal development. IQMS is focused on educator development but if educators cannot do justice to DSGs because of heavy teaching loads, then the DoE needs to revisit its policy on educator/learner ratios of 35:1 for secondary schools and 40:1 for primary schools thus affording schools a more favourable post establishment.

3.7 SUMMARY

The focus of this chapter was on the approach used to conduct the empirical investigation. In addition to a motivation for the researcher's preference for a quantitative method of research, an exposition on the composition and distribution of the questionnaire was given.

The analysis of the items provided a strong indication of the perceptions of respondents with regard to the implementation of IQMS and the impact of this process on school leadership. Clearly, respondents do not feel confident about implementing IQMS – moreover, a large number indicated that the implementation of IQMS will result/has resulted in an increase in their workloads.

Chapter four will focus on the following: the validity and reliability of the research instrument, factor analysis, a comparative analysis of some of the data as well as a statistical analysis of certain aspects of the data.

CHAPTER 4: ANALYSIS AND INTERPRETATION OF SELECTED SAMPLE OF EMPIRICAL DATA

4.1 INTRODUCTION

Chapter three focused on the research design and an empirical investigation which includes the research group and a discussion of the items in the questionnaire relevant to IQMS and the impact this process has on school leadership. The researcher outlined the criteria used for the selection of the sample as well as the method of data collection.

The discussion in this chapter will be limited to the following: the reliability and validity of the research instrument; a comparison of two independent groups followed by an analysis and interpretation of the statistical tests of selected sample; a presentation of a few contingency tables.

Struwig and Stead (2001:130) define reliability as the extent to which test scores are accurate, consistent or stable. A test score's validity is dependent on the score's reliability since if the reliability is inadequate, the validity will also be poor.. Within this context, issues of reliability and validity of the research instrument used as well as ethical issues are discussed.

4.2 RELIABILITY AND VALIDITY OF THE RESEARCH INSTRUMENT

According to Babbie (2005:144), social scientists have found that it's possible to measure almost anything provided that criteria for measuring quality is applied - the yardstick against which we judge our relative success or failure in measuring things. Babbie (2005:145) continues that when social researchers construct and

evaluate measurements however, they pay special attention to two technical considerations: reliability and validity.

Mouton (2001:119) explains that in the abstract, reliability is a matter of whether a particular technique, applied repeatedly to the same object, would yield the same result each time.

Bless et al (1995:130) state that reliability is concerned with the consistency of measures and contend that an instrument which produces different scores every time it is used to measure an unchanging value, has low reliability. On the other hand, an instrument which always gives the same score when used to measure an unchanging value can be trusted to give an accurate measurement and is said to have high reliability.

Struwig and Stead (2001: 136) define validity as the extent to which a research design is scientifically sound or appropriately conducted. Two types of validity for research designs are listed: external, validity and internal validity. External validity is defined as the extent to which you can generalise the results of a study to other populations. The external validity of a study is intimately linked to the sampling procedures, time, place, and conditions in which the research was conducted. The internal validity of an experimental research design addresses the issue of whether the independent variables, and not other extraneous variables, are responsible for variations in the dependent variable. (Struwig and Stead, 2001:136)

Face validity refers to whether the measurement is valid “on its face”, whether or not it’s adequate. Babbie (2005:148). Content validity refers to the extent to which the items reflect the theoretical content domain of the construct being measured Struwig and Stead (2001:139). The researcher has taken careful note to include numerous possible important components of IQMS within the context of the topic: how IQMS impacts on the leadership of schools. A test should comprise items that reflect important aspects of the construct being measured. Criterion-related

validity, according to Babbie (2005:149) sometimes called predictive validity, is based on some external criterion. For example, the validity of a school readiness test for grade one is determined by the relationship between the results learners obtained in the test and their progress in grade one. Construct validity: A test has construct validity to the extent that it can be shown to measure a particular hypothetical construct. In Struwig et al (2001:146) the researcher is cautioned against exchanging accuracy for generalisability, for while data may be generalisable, they may not apply to any person in the group. The construct validity of this questionnaire was investigated by means of successive factor analytical procedures.

The aim of factor analysis is to determine the underlying factors or dimensions in a set of opinion-related questions. Once it is established which questions form a group or contributes most to the factor, it is possible to give a name to the underlying dimension by considering the wording of the individual questions in that factor. Factor analysis thus helps the researcher to reduce the number of questions to a few, interpretable factors or dimensions and enables the researcher to describe the results of a survey in a concise manner by concentrating on the factors rather than on the individual questions (Eiselen et al:104-105).

Questions used in the questionnaire were designed around concepts identified from literature based on the introduction of a monitoring and assessment tool. In order to determine how successful the implementation of IQMS is, it was necessary to quantify respondents' level of understanding IQMS and to what extent they believe in IQMS.

As mentioned above, IQMS is essentially the implementation of a monitoring and assessment tool to enhance teaching and learning and since the topic of this mini-dissertation is the impact of IQMS on school leadership, it seemed appropriate to include a factor that encompasses school leadership and educator appraisal.

Based on the explanation outlined above, these items were reduced to three factors:

- Factor 1: Understanding IQMS
- Factor 2: Believing in IQMS and
- Factor 3: Management and Appraisal

To facilitate the processing of the statistics, factor analytic procedures were performed using the SPSS 11,0 programme to identify the three factors mentioned above.

The scale used in the questionnaire has been reduced from a 5-point scale

To no extent	To a small extent	To a moderate extent	To a large extent	To a very large extent
1	2	3	4	5

to a 3-point scale

To no/small extent	To a moderate extent	To a large / very large extent
1	2	3

The researcher found it necessary to collapse the 5-point scale to a 3-point scale because a more equitable response rate was needed for the categories. It seemed logical to interact with a scale that indicates a negative response and a positive response. The moderate response between the two extremes would either be tending towards negative or tending towards positive.

Having outlined the factors with regard to the impact of IQMS on school leadership, it is necessary to state the hypotheses and discuss the statistical analysis.

4.3 HYPOTHESES

Hypotheses will be formulated in respect of selected independent groups. According to De Vos et al (2002:36), hypotheses are always in declarative sentence form, and they relate either generally or specifically, variables to variables. Hypotheses - testing involves the comparison of two or more independent groups by stating the hypothesis, focusing on the p-values and making an inference based on the p-value. Two hypothesis are stated, a null hypothesis: H_0 , the variable impacts on the results and an alternative hypothesis: H_1 , If the p-value is less than $p = 0,05$ ($p < 0,05$) the null hypothesis will be rejected; if the p-value is greater than $p = 0.05$ ($p > 0.05$) we do not reject the null hypothesis(i.e. we accept the H_0) Thus- for hypotheses testing, the null hypotheses will be rejected or not rejected.

The discussion that follows will focus on each of the dependant variables respectively: IQMS Understand, IQMS Believe and Management and Appraisal in relation to a number of independent variables.

4. 3.1 Hypotheses and Data Analysis for two independent groups in respect of three dependent variables

TABLE 4.1 HYPOTHESIS WITH LANGUAGE GROUPS AS THE INDEPENDENT VARIABLE IN RELATION TO EACH OF THE THREE FACTORS.

Dimension	Variable	Symbol	Description	Test
Multivariate	Language	Hot 1	There is statistically no significant difference amongst the mean scores of the four language groups regarding educators' understanding of IQMS.	ANOVA
		Hat 1	There is a statistically significant difference amongst the mean scores of the four language groups regarding educators' understanding of IQMS.	
Univariate		HoT	The mean scale values of the four language groups do not differ statistically significantly from one another in respect of the following factors taken	ANOVA

Dimension	Variable	Symbol	Description	Test
		Hot 1 Hot 2 Hot 3	separately: Understanding IQMS Believing in IQMS Management and Appraisal	
Univariate		Hat Hat 1 Hat 2 Hat 3	There is a statistically significantly difference among the mean scale values of the four language groups in respect of the three factors taken separately: Understanding IQMS Believing in IQMS Management and Appraisal	ANOVA

From the data in Table 4.3 it can be seen that the three categories differ in relation to the three factors. The p-values of all factors are smaller than 0.05, we therefore reject the null hypothesis, thus indicating that there is a difference between the perceptions/opinions of educators from different language groups and their level of understanding and believing in IQMS as well as their perceptions of management and appraisal.

TABLE 4.2 HYPOTHESIS FOR FOUR LANGUAGE GROUPS AS THE INDEPENDENT VARIABLE AND EACH OF THE FACTORS TAKEN SEPARATELY

Symbol	Description					
Hot	There are no statistically differences between the mean scores of the four language groups when compared pair-wise in respect of the following factors:					
Factor	Pairs of groups					
	A vs B	A vs C	A vs D	B vs C	B vs D	C vs D
Understanding IQMS	Hot.AB1	Hot.AC1	Hot.AD1	Hot.BC1	Hot.BD1	Hot.CD1
Believing in IQMS	Hot.AB2	Hot.AC2	Hot.AD2	Hot.BC2	Hot.BD2	Hot.CD2
Management and Appraisal	Hot.AB3	Hot.AC3	Hot.AD3	Hot.BC3	Hot.BD3	Hot.CD3
Symbol	Description					
Hat	There are statistically significant differences between the mean scores of the four language groups when compared pair-wise in respect of the following factors:					
Factor	Pairs of groups					
	A vs B	A vs C	A vs D	B vs C	B vs D	C vs D
Understanding IQMS	Hat.AB1	Hat.AC1	Hat.AD1	Hat.BC1	Hat.BD1	Hat.CD1
Believing in	Hat.AB2	Hat.AC2	Hat.AD2	Hat.BC2	Hat.BD2	Hat.CD2

IQMS						
Management and Appraisal	Hat.AB3	Hat.AC3	Hat.AD3	Hat.AC3	Hat.BD3	Hat.CD3

A = Afrikaans; B = English; C = Sotho; D = Nguni

In respect of the pair-wise comparison in table 4.3 (below), the following conclusions can be made:

- Relative to the understanding of IQMS, educators in the mother tongue group B, have scored higher than educators in the rest of the groups (ACD). The mean score for Language group B is statistically significant at the 1% level when compared to the mean score of language group D (2.90). The fact that the training was conducted in English would ensure that group B has a better understanding of the IQMS process. This data suggests that the DoE needs to make provision for African languages when training educators to ensure an understanding of important processes like IQMS for all educators.
- In respect of believing in IQMS, educators in the language group C have a higher mean score than educators in language groups ABD. The reason for this may be that educators in this group believe that IQMS is a process that could enhance the development of educators.
- In respect of management and appraisal, educators in the language group C has the highest mean score whilst educators in language group A has the lowest mean score. However, within the context of a five-point scale, the mean scores of all four language groups suggest that educators in general view management and appraisal in a positive light. The reason for this may be the fact that in order to receive a salary or grade progression, an educator's performance has to be appraised first.

TABLE 4.3 SIGNIFICANCE OF DIFFERENCES AMONGST THE FOUR LANGUAGE GROUPS WITH RESPECT TO THE THREE FACTORS:

Factors	Group	Mean	ANOVA (p-value)	Scheffe/Dunett T3				
					A	B	C	D
Under - stand IQMS	A	3.41	.000 **	A	-	-	-	*
	B	3.73		B	-	-	*	**
	C	3.19		C	-	*	-	-
	D	2.90		D	*	**	-	-
Believe in IQMS	A	3.09	.044 *	A	/	-	-	-
	B	3.05		B	-	/	-	-
	C	3.34		C	-	-	/	-
	D	2.90		D	-	-	-	/
Manage - ment and Appraisal	A	3.01	.016 *	A	-	-	*	-
	B	3.08		B	-	-	*	-
	C	3.37		C	*	*	-	-
	D	3.13		D	-	-	-	-

A = Afrikaans; B = English; C = Sotho; D = Nguni

* Statistically significant at the 5% level ($p > 0.01$ but $p < 0.05$)

- ** Statistically significant at the 1% level ($p < 0.01$)
- No statistically significant difference amongst groups

The above table indicates that English has the highest mean score for factor 1 (3.73). On a five point scale a mean score of 3.73 tending towards 4 implies that educators with English as the mother tongue, understand the IQMS process to a large extent. A plausible explanation is the fact that educators with English as mother tongue had an advantage over educators from the other language groups as the IQMS training was conducted in English.

The two so-called “black languages” show the highest (Sotho =3.34) and lowest (Nguni =2,90) mean scores respectively suggesting that Sotho speaking educators are believe in IQMS as opposed to Nguni speaking educators who believe in IQMS to a lesser degree.

With regard to management and appraisal, the mean scores of the four language groups range from 3.01 to 3.37. On a five point scale this data could imply that educators in general are not apposed to this process. Could this allude to the fact that management and appraisal is directly linked to performance rewards? According to Resolution 8 of 2003 (ELRC), an educator’s performance has to be appraised by the Developmental Support Group, both during the developmental cycles as well as for the summative evaluation. The score received for the summative evaluation will determine if the educator qualifies for a salary and/or grade progression.

TABLE 4.4 HYPOTHESIS WITH MALE AND FEMALE RESPONDENTS AS AN INDEPENDENT VARIABLE IN RESPECT OF EACH OF THE THREE FACTORS

Dimension	Variable	Symbol	Description	Test
Univariate	Gender	Hot 1	There is statistically no significant difference between the mean scores of males and females in respect of understanding IQMS	T-Test
		Hat 1	There is a statistically significant difference between the mean scores of males and females in respect of understanding IQMS	

Dimension	Variable	Symbol	Description	Test
Univariate		Hot 2	There is statistically no significant difference between the mean scores of males and females in respect of believing in IQMS	T-test
		Hat 2	There is a statistically significant difference between the mean scores of males and females in respect of believing in IQMS	
Univariate		Hot 3	There is statistically no significant difference between the mean scores of males and females in respect of management and appraisal as part of the IQMS process.	T-test
		Hat 3	There is a statistically significant difference between the mean scores of males and females in respect of management and appraisal as part of the IQMS process.	

The data in Table 4.5 indicates that males and females do not differ with regard to Hot 1 and Hot 2. The p-values of Hot 1 and Hot 2 are greater than $p = 0.05$. This implies that there is no statistically significant difference between the mean scores of male and female educators, and therefore the null hypothesis cannot be rejected.

From the data in Table 4.5 it can also be seen that males and females differ only with respect to Hot 3. The p-value of Hot 3 is $p = .045$. The value is less than $p = 0.05$, which implies that there is a statistically significant difference between the mean scores of the two groups. This also implies that the alternate hypothesis cannot be rejected.



TABLE 4.5 SIGNIFICANCE OF DIFFERENCES BETWEEN MALE AND FEMALE RESPONDENTS WITH RESPECT OF THE FOLLOWING FACTORS:

Factor	Group	Factor Mean	t-test Sig. (2-tailed)
Understanding IQMS	Male	3.50	.172
	Female	3.36	
Believing in IQMS	Male	3.21	.078
	Female	3.03	
Management and Appraisal	Male	3.23	.045 *
	Female	3.06	

The data in Table 4.5 also reveal the following:

Male educators (3.23) have a higher mean score than female educators (3.06) with regard to management and appraisal as part of the IQMS process. Although the factor mean score of male is higher than that of their female counterparts, on a five point scale this means that both male and female educators believe to a moderate extent that management and appraisal could lead to effective development of educators. This reinforces the suggestion that educators are not quite sure what to expect from this new approach to quality assurance hence the preference for a moderate response.

TABLE 4.6 HYPOTHESIS WITH POST LEVEL AS AN INDEPENDENT VARIABLE IN RESPECT OF EACH OF THE THREE FACTORS

Dimension	Variable	Symbol	Description	Test
Univariate	Post level	Hot 1	There is statistically no significant difference between the mean scores of educators and management in respect of understanding of IQMS	ANOVA
		Hat 1	There is a statistically significant difference between the mean scores of the opinions of educators and management in respect of understanding of IQMS	
Univariate	Post level	Hot 2	There is statistically no significant difference between the mean scores of educators and management in respect of believing in IQMS	ANOVA
		Hat 2	There is a statistically significant difference between the mean scores of educators and management in respect of believing in IQMS	
Univariate	Post level	Hot 3	There is statistically no significant difference between	ANOVA

Dimension	Variable	Symbol	Description	Test
		Hat 3	<p>the mean scores of the educators and management in respect of management and appraisal as part of the IQMS process.</p> <p>There is a statistically significant difference between the mean scores of educators and management in respect of management and appraisal as part of the IQMS process.</p>	

From the data in Table 4.7 it can be seen that the four categories differ in relation to the three factors. The p-values of Hot 1 and Hot 3 are smaller than $p = 0.05$, we therefore reject the null hypothesis, thus indicating that there is a difference between the perceptions/opinions of educators in different post levels regarding their understanding of IQMS as well the management and appraisal of educators as part of the IQMS process.

TABLE 4.7 SIGNIFICANCE OF DIFFERENCES BETWEEN THE MEAN SCORES OF RESPONDENTS AT DIFFERENT POST LEVELS IN RESPECT OF THE THREE FACTORS

Dependent Variable	Category	N	Mean	ANOVA (p-value)
1 Understanding IQMS	Principal	31	3.94	.000 **
	Deputy Principal	31	3.58	
	Head of Department	91	3.52	
	Educator	173	3.16	
	Total	326	3.37	
2. Believing in IQMS	Principal	31	3.24	.121
	Deputy Principal	32	3.22	
	Head of Department	91	3.16	
	Educator	166	2.98	
	Total	320	3.08	
3. Management and Appraisal	Principal	34	3.35	.016 *
	Deputy Principal	32	3.22	
	Head of Department	90	3.21	
	Educator	180	3.01	
	Total	336	3.12	

According to the data in Table 4.7 above, the following is noted:

Understanding IQMS: Principals represent the highest mean score of 3.94 tending towards 4. This indicates that in respect of understanding the process, principals are more confident. A possible explanation could be the fact that considerable emphasis is placed on the duties and responsibilities of the principal in respect of the implementation of IQMS. Policy requires that principals are responsible for the effective implementation of the process. To this end, principals would want to be familiar with the instrument to ensure that all the stakeholders understand the process and that the process unfolds in accordance with the correct procedures.

Believing in IQMS: The p-value of Hot 2 is $p = .121$. This value is greater than $p = 0.05$ and this implies that there is statistically no significant difference between the perceptions/opinions of educators from different post levels and their level of believing in IQMS and therefore the null hypothesis cannot be rejected and Hat 2 is rejected. The impact of chance on the perceptions of educators and management with regard to IQMS is negligent.

Interesting to note is the mean value of educators which is 2.98. On a five – point scale this indicates that this group believes to a moderate extent in the effectiveness of IQMS as a quality assurance approach. This neutral response could be attributed to three reasons: educators have been subjected to numerous unsuccessful quality assurance initiatives over the years; educators perceive the IQMS instrument as a process that could cause an increase in their work load; educators view the 1% salary progression in respect of the Performance Management System (PMS) as inadequate.

Management and Appraisal: The factor mean scores of senior management in schools are higher than that of educators. This data may suggest that the leadership in schools welcome the opportunity provided by the DAS component of IQMS to monitor and evaluate the development of educators as a means of ensuring effective teaching and learning.

4.4 REPORT ON CROSS-TABULATIONS

Whenever we classify subjects in relation to two separate qualitative variables simultaneously for purposes of determining their degree of association, we create what is known as a cross-tabulation. This is a test to determine whether two independent variables are associated. If the researcher wants to perform real statistical inference, a chi-square test can be done, testing the null hypothesis of no association between the two qualitative variables against the alternative hypothesis of statistical significant association (De Vos, 2002:242)

Cross-tabulations were carried out in order to analyse the categorical data. The test statistics used were the Pearson Chi Square and the Fischer's Exact Test, The Pearson statistic is appropriate when a table matrix is larger than 2X2. This measure is based on the fact that we can compute the expected frequencies in a two way table, that is, frequencies that we would expect if there was no relationship between the variables. The Fishers Exact Test is used when the table is in its smallest form i.e. 2X2. The term Asymptotic (Asymp. Sig.) refers to the p-value that is used to test the hypothesis.

Certain cross-tabulated (Quasi-independent) variables were found to have a significant influence on the dependent variables. In this regard the following items were analysed by means of cross tabulation:

- mother tongue vs WSE is judgmental by nature
- mother tongue vs educator turnover disrupts WSE
- employee organizations vs educator turnover disrupts WSE
- post levels vs educator turnover disrupts WSE
- post levels vs WSE resulting in more resources being allocated and
- regions vs district officials supporting the implementation of PMS and IQMS

TABLE 4.8 CROSS TABULATION OF THE SIGNIFICANCE OF MOTHER TONGUE VS WSE IS JUDGMENTAL BY NATURE

WSE IS JUDGMENTAL BY NATURE (PERCENTAGE)				
LANGUAGE	To no / small extent	To a moderate extent	To a large extent	Total
Afrikaans	28.2	52.9	18.8	100.0
English	23.1	40.7	36.3	100.0
Sotho	33.9	39.3	26.8	100.0
Nguni	22.9	35.4	41.7	100.0
Total	26.8	43.2	30.0	100.0

The data in Table 4.8 indicates the following:

- A mere 18.8% of educators from the Afrikaans mother-tongue group believe to a large extent and 52.9% believe to a moderate extent that WSE is judgemental by nature. This data suggests that a fair number of educators in this group do not perceive WSE to be judgemental by nature. A large number of Afrikaans – speaking educators hail from the former Model C schools where the infrastructure and resources by far outshines the resources available at Former DET schools. The former Model C schools also benefit from a lower educator/learner ratio. In light of the above, the scores for this group could imply that these educators will feel more comfortable about WSE than their counterparts from Former DET

schools. This inference is supported by a score of 41.7% of educators from the Nguni group who believe to a large extent that WSE is judgmental by nature.

- From the English-speaking group, 36.3% believe to a large extent that WSE is judgmental by nature. A large number of English-speaking educators hail from former House of Representatives (HOR) and House of Delegates (HOD) schools. Educators in this category would also perceive their schools to be disadvantaged in respect of infrastructure and resources which will have a negative impact on WSE. The majority of educators at schools other than former Model C schools will therefore perceive WSE to be judgmental by nature.
- The responses from the four language groups varied in respect of the extent to which they agree that WSE is judgmental by nature. While the four language groups agree to varying degrees that WSE is judgmental by nature, the table shows that the Nguni group (41.7%) believe to a large extent that WSE is judgmental by nature. In the other language groups, the highest percentages appear in the “moderate” column. A possible explanation for this moderate option, is that the majority of schools had not experienced WSE at the time of the survey while the few schools that did undergo WSE, were evaluated by an external WSE team from the Office of Standards in Education (OFSTED), a sub-directorate of GDE.

TABLE 4.9 CHI-SQUARE TESTS: MOTHER TONGUE VS WSE IS JUDGMENTAL BY NATURE

TEST	ASYMP. SIG (2 – SIDED)
Pearson Chi - Square	0.660
Number of valid cases	280

The Pearson Chi-Square value $p = 0,660$ ($p > 0.05$). This implies that there is statistically no significant difference between the responses of the different language groups relating to WSE is judgmental by nature implying that irrespective of their home language, respondents will experience WSE as judgmental.

TABLE 4.10 CROSS TABULATION OF THE SIGNIFICANCE OF MOTHER TONGUE VS EDUCATOR TURNOVER DISRUPTS WSE

EDUCATOR TURN-OVER DISRUPTS WSE (PERCENTAGE)				
LANGUAGE	To no / small extent	To a moderate extent	To a large extent	Total
Afrikaans	18.1	54.2	27.7	100.0
English	19.8	37.4	42.9	100.0
Sotho	48.1	33.3	18.5	100.0
Nguni	32.6	28.3	39.1	100.0
Total	27.0	40.1	32.8	100.0

The data in table 4.10 indicate that the responses from the four language groups varied in respect of the extent to which they agree that educator turn-over disrupts WSE:

Afrikaans = 54.2 “agree to a moderate extent”. More than half of the respondents in this group are somewhat uncertain about the effect educator turn-over has on WSE. WSE is a component of IQMS. The latter process requires that each educator completes a Personal Growth Plan (PGP) which in turn will inform the School Improvement Plan (SIP). The successful implementation of the SIP is crucial to WSE. Educator turn-over will result in the SIP changing and this will impact on WSE. Moreover, educator turn-over will also result in the Developmental Support Groups (DSG’s) changing midway through the process/year.

English = 42.9 “agree to a large extent”

Of the four language groups, a significant number in this group agree strongly that educator turn-over disrupts WSE

Sotho = 48.1 “agree to no/small extent”

Almost half the number of respondents in this group agree to no/small extent that educator turn – over does in fact disrupt WSE. A possible explanation could be that respondents do not clearly understand the IQMS processes and because of this lack of clarity, cannot see/understand the connection between staff turn-over and WSE. It is also likely that these educators are attached to schools where educator turn-over has been or still is non-existent. Only 18.5 - the smallest number in this category, agree to a large extent that educator turn-over disrupts WSE

Nguni = 28.3 “agree to a moderate extent”

The figure above represents the lowest percentage in this language group– agreeing to a moderate extent that educator turn-over disrupts WSE. This group of respondents could also be part of a staff establishment where educator turn-over has not been much of a concern, therefore the neutral response. What is significant here is that the percentages for the two opposite/extreme groups “agree to no/small extent” = 32.6 and “agree to a large extent” = 39.1 respectively, are relatively close. This could mean that the respondents from this language group are spread across schools where educators display different levels of understanding IQMS - a good, not so good and moderate grasp of IQMS.

TABLE 4.11 CHI-SQUARE TESTS: MOTHER TONGUE VS EDUCATOR TURNOVER DISRUPTS WSE

TEST	ASYMP. SIG (2 – SIDED)
Pearson Chi - Square	0.000
Number of valid cases	274

The Pearson Chi-Square value $p = 0,00$ indicates that there is a statistically significant difference between the response of the different language groups relating to the extent of agreement about educator turn-over disrupting WSE.

TABLE 4,12 CROSS TABULATIONS OF THE SIGNIFICANCE OF EMPLOYEE ORGANISATIONS vs EDUCATOR TURNOVER DISRUPTS WSE

EDUCATOR TURNOVER DISRUPTS WSE (PERCENTAGE)				
EMPLOYEE ORGANISATION	To no / small extent	To a moderate extent	To a large extent	Total
SADTU	36.8	32.9	30.3	100.0
OTHER	19.7	43.1	37.2	100.0
TOTAL	28.8	37.7	33.6	100.0

The data in Table 4.12 indicates the following:

The responses from SADTU varied from the group “Other” in respect of the extent to which they agree that educator turn-over disrupts WSE:

SADTU = 36.8% “agree to no/small extent that educator turn-over disrupts WSE” This is an indication that SADTU is more positive about WSE. A possible explanation for this could be the fact that SADTU’s ideologies are firmly entrenched in the principles of equity and redress. It is therefore expected that the leadership of SADTU would support all components of IQMS, especially WSE which is expected to evaluate all aspects of the school with the intention of putting in place developmental strategies that would ensure equity and redress. Staff turn-over would be regarded by the leadership of this union as a normal consequence of ensuring equity in terms of representivity. However, it should be noted that the percentages of the other two categories – 32.9% “to a moderate extent” and 30.3% “to a large extent” are not significantly lower than 36.8%. A fair number of the membership appears to have realised that changes on the staff establishment of the school is bound to impact on the successful implementation of WSE.

TABLE 4.13 CHI-SQUARE TEST FOR EMPLOYEE ORGANISATIONS VS EDUCATOR TURNOVER DISRUPTS WSE

TEST	ASYMP. SIG (2 – SIDED)
Pearson Chi - Square	.006
Number of valid cases	292

The Pearson Chi-Square value $p = 0,006$ ($p < 0,05$) indicates that there is a significant difference between the responses of the different educator organisations relating to the extent of agreement about educator turn-over disrupting WSE

TABLE 4.14 CROSS-TABULATION OF THE SIGNIFICANCE OF POST LEVELS vs EDUCATOR TURNOVER DISRUPTS WSE

EDUCATOR TURN-OVER DISRUPTS WSE (PERCENTAGE)				
POST LEVEL	To no / small extent	To a moderate extent	To a large extent	Total
Principal	25.0	43.8	31.3	100.0
Deputy Principal	6.7	33.3	60.0	100.0
Head of Department	24.7	37.6	37.6	100.0
Educator	33.3	39.9	26.8	100.0
Total	27.8	39.0	33.3	100.0

The data in Table 4.14 reveal the following:

Deputy Principals' responses indicate that 6.7% “agree to no/small extent” in contrast to 60.0% who “agree to a large extent” that educator turnover disrupts WSE. It would appear that Deputy Principals are a lot more negative about the impact educator turnover would have on WSE. This negative trend could be attributed to the following factors: many Deputy Principals are part of the (SDT) School Development Team – the team that drives the IQMS process; in addition Deputy Principals serve on a number of DSG's and also have to cope with their share of teaching responsibilities. Additional responsibilities like ensuring the implementation of the SIP; having to cope with a constant staff turnover (which entails changing time tables); the SDT having to review the Management Plans for the implementation of IQMS and ensuring that new/additional DSG's are selected, will definitely increase the responsibilities and workloads of Deputy Principals who are likely to be part of the SDT.

Just under 35.0% of Principals and Heads of Departments also “agree to a large extent” that educator turnover disrupts WSE compared to a 26.8% of the educator group who “ agree to a large extent” that educator turnover disrupts WSE. This data suggests that the School Management Team (SMT) in contrast to educators, are less positive about educator turnover as it invariably results in increasing workloads in respect of WSE.

TABLE 4.15 CHI-SQUARE TEST FOR POST LEVELS VS EDUCATOR TURNOVER DISRUPTS WSE

TEST	ASYMP. SIG (2 – SIDED)
Pearson Chi - Square	.011
Number of valid cases	315

The Pearson Chi-Square value $p = 0,011$ ($p < 0,05$) indicates that there is a significant difference between the responses of the different post levels relating to the extent of agreement about educator turn-over disrupting WSE

TABLE 4.16 CROSS TABULATIONS OF THE SIGNIFICANCE OF POST LEVELS vs WSE RESULTING IN MORE RESOURCES BEING ALLOCATED TO A SCHOOL

WSE RESULTS IN MORE RESOURCES BEING ALLOCATED TO A SCHOOL (PERCENTAGE)				
CURRENT POST	To no / small extent	To a moderate extent	To a large extent	Total
Principal	67.6	26.5	5.9	100.0
Deputy Principal	73.3	20.0	6.7	100.0
Head of Department	54.1	36.5	9.4	100.0
Educator	40.1	39.5	20.3	100.0
Total	49.8	35.5	14.6	100.0

The data in Table 4.16 indicates the following:

The responses reflect an inverse relationship to hierarchy. Educators are less negative than SMT members regarding WSE resulting in more resources being allocated to schools. Despite the fact that a very small number of schools have been involved in WSE, it is not clear if such schools had actually benefited from more resources being allocated to them. However, the principle of redress on which the IQMS process is modelled, are aimed at those schools that have been disadvantaged. Within the constraints of a limited budget, it is possible that provincial departments would prefer that only such schools (previously disadvantaged) benefit from more resources being allocated. The data could also infer that SMT members are more sceptical than post level one educators as they are more knowledgeable regarding the allocation/non-allocation of resources at schools.

TABLE 4.17 CHI - SQUARE TEST: POST LEVELS vs WSE RESULTS IN MORE RESOURCES BEING ALLOCATED TO A SCHOOL

TEST	ASYMP. SIG (2 – SIDED)
Pearson Chi - Square	.011
Number of valid cases	315

The Pearson Chi-Square value $p = 0,011$ ($p < 0,05$) indicates that there is a significant difference between the responses of the different post levels relating to the extent of agreement about WSE resulting in more resources being allocated to schools



TABLE 4.18 CROSS TABULATION OF THE SIGNIFICANCE OF DIFFERENCES: HAVE DISTRICT OFFICIALS VISITED YOUR SCHOOL TO SUPPORT IQMS vs HAVE DISTRICT OFFICIALS VISITED YOUR SCHOOL TO SUPPORT PMS?

		HAVE DISTRICT OFFICIALS VISITED YOUR SCHOOL TO SUPPORT IQMS ?		Total
		Yes	No	
HAVE DISTRICT OFFICIALS VISITED YOUR SCHOOL TO SUPPORT PMS?	Yes	70.90	23.10	100.0
	No	35.30	64.70	100.0
	Total	46.80	53.20	100.0

Table 4.18 indicates the following:

The number of respondents who answered “yes” to Districts officials visiting the school to support the implementation of PMS and respondents “yes” to District officials visiting the school to support the implementation of IQMS = 70.90%. This is a very positive response in respect of District support. It could indicate one of two possibilities: respondents regard support for IQMS and PMS to be the same thing as PMS is a component of IQMS or, District officials visited the school on separate occasions to support the implementation of each process in turn.

Respondents who answered “No” to Districts officials visiting the school to support the implementation of PMS and respondents who answered “No” to District officials visiting the school to support the implementation of IQMS = 64.7%

In contrast to the “yes/yes” responses above, the “ No/No “ figures suggest that a large number of schools received no district support in the category ” District officials visiting schools to support the implementation of PMS “ nor in the category “District officials visiting the school to support the implementation of IQMS.”

The overall total of 53.2% = “No” as opposed to the total of 46.8% = “yes” supports the suggestion that District officials provided no support to schools in any of the IQMS components. According to the IQMS process, district support will depend on the District Improvement Plan (DIP) meaning that priority will be given to schools that have requested district intervention in their School Improvement Plan (SIP). Schools could miss out on district intervention if an analysis of the IQMS profile of the school reveals the following: A SIP has not been submitted to the district despite reminders to do so; if a SIP has been received, it makes no mention of any intervention required from the district or from any other external source. With regard to PMS, schools should guard against the following: educators receiving very high scores although learner achievement of such a school may not correlate with the (high) scores for educators submitted to the district; during the moderation process, principals and SMTs should ensure that there is no contradiction with regard to an educator’s summative evaluation and the Personal Growth Plan (PGP). It should not be possible for an educator to receive a rating of 80% and more when a number of areas have been listed in the PGP as needing support.

TABLE 4.19 CHI-SQUARE TEST OF SIGNIFICANCE: HAVE DISTRICT OFFICIALS VISITED YOUR SCHOOL TO SUPPORT THE IMPLEMENTATION OF IQMS VS HAVE DISTRICT OFFICIALS VISITED YOUR SCHOOL TO SUPPORT THE IMPLEMENTATION OF PMS ?

TEST	Exact Sig (2 – SIDED)
Fisher’s Exact Test	.020
Number of valid cases	47

The p-value of Fischer’s exact test is $p = .020$ which is smaller than $P = 0.05$. This implies that there is a statistically significant difference in the response: Have district officials visited your school to support the implementation of IQMS vs have district officials visited your school to support the implementation of PMS?

4.5 SUMMARY

This chapter focused on the analysis and interpretation of the empirical data. The empirical data, based on the opinions of educators regarding IQMS and its impact on school leadership, were obtained by means of a questionnaire containing 39 items which were divided into four sections. The 39 items were reduced to three factors by means of a factor analysis process:

- Factor 1: Understanding IQMS
- Factor 2: Believing in IQMS and
- Factor 3: Management and Appraisal

The factor analytical process was unable to reduce the items in Section C of the questionnaire to an interpretable factor. However, as mentioned earlier in this

chapter, questions used in the questionnaire were designed around concepts identified from literature, based on the introduction of a monitoring and assessment tool. Therefore, in order to determine how successful the implementation of IQMS is, it is necessary to determine whether some of the independent variables in this section are associated. In light thereof, the researcher found it necessary to present some contingency tables namely, mother tongue vs WSE is judgmental by nature; mother tongue vs educator turnover disrupts WSE; employee organizations vs educator turnover disrupts WSE; post levels vs WSE results in more resources being allocated to a school; district officials visiting the schools to support implementation of IQMS vs district officials visiting school to support the implementation of PMS;

The following exposition is intended to highlight significant indicators that came to light in respect of the three factors and the contingency tables:

With regard to understanding the IQMS process, educators with English as mother tongue had an advantage over educators from the other language groups as the IQMS training was conducted in English. This indicates a need to view the training process more closely. However, data shows suggest that Sotho speaking educators are more positive about IQMS.

With regard to the extent to which the different post levels understand IQMS, principals are shown to be more confident in respect of understanding the process. Policy requires that principals are responsible for the effective implementation of the process. The role of the principal is therefore crucial to the effective implementation of IQMS.

Compared to promotion-post holders, data suggests that educators at post level one are somewhat uncertain with regard to believing in IQMS. This uncertainty could be attributed to three reasons: educators have been subjected to numerous unsuccessful quality assurance initiatives over the years; educators perceive the IQMS instrument as a process that could cause an increase in their work load;

educators view the 1% salary progression in respect of the Performance Management System (PMS) as inadequate.

With regard to management and appraisal, respondents from the black language groups are to a small degree more positive regarding the management and appraisal processes than their counterparts from the English and Afrikaans language groups. Data also suggests that educators in general are not apposed to this process. Could this allude to the fact that management and appraisal is directly linked to performance rewards?

Mother tongue vs educator turnover disrupts WSE:

English speaking educators in general agree that educator turnover is a disrupting influence to WSE. Issues of the DSG, PGP, SIP and how these affect WSE is a point for discussion. Respondents in general perceive WSE to be judgmental by nature.

Post levels vs WSE results in more resources being allocated:

The responses reflect an inverse relationship to hierarchy. Educators are less negative than SMT members about WSE resulting in more resources being allocated to schools.

Employee Organisations vs educator turnover disrupts WSE:

SADTU membership in general view the effect of educator turnover on WSE in a less negative light than other union members.

Post levels vs educator turnover disrupts WSE:

It would appear that Deputy Principals are a lot more negative about the impact educator turnover would have on WSE.

Have district officials visited your school to support the implementation of IQMS vs

have district officials visited your school to support the implementation of PMS:

The data suggests that District officials provided very little support to schools in any of the IQMS components.

CHAPTER 5: SUMMARY, FINDINGS AND RECOMMENDATIONS

5.1 INTRODUCTION

The preceding chapter presents the analysis and interpretation of data collected from educators in schools in the selected districts of Gauteng. Chapter five will focus on the following aspects:

Review of the research;

Important findings from the literature study;

Empirical findings of the research;

Recommendations; and

Conclusion

5.2 REVIEW OF THE RESEARCH

Chapter 1 outlined the introduction, background to the research problem, statement of the research problem, aims of the research, the research methodology, the demarcation of the research, clarifications of the concepts and the layout of the research project.

Chapter 2 focused on a literature study that clarified the events and policies that led to the creation of various quality management approaches and how the shortcomings of these instruments led to the introduction of IQMS. This chapter also included the clarification of certain salient concepts which the researcher

considered to be central to determining the impact of IQMS on school leadership. The researcher provided a discussion on the implementation theory which focused on strategy implementation. A brief exposition was provided on the components of the IQMS instrument as well as trends and challenges that emerged during the implementation of IQMS. This chapter included detail attributed to the impact of IQMS on school leadership.

Chapter 3 presented the design and composition of the research instrument, the sampling technique and the administration of the questionnaire. The chapter also contained a summary of responses for each section of the questionnaire.

The analysis and interpretation of the empirical data gathered from the respondents with regard to their perceptions on the impact of IQMS on school leadership was discussed in chapter 4. A discussion on the reliability and validity of the structured questionnaire was provided.

Chapter five presents important findings emanating from the literature review as well as the empirical findings of the research. These findings are now briefly expanded on and recommendations for the implementation of a management strategy to assist school leadership to cope with the challenges posed by the complexity of IQMS will be presented.

5.3 IMPORTANT RESEARCH FINDINGS EMERGING FROM THE LITERATURE REVIEW

The findings presented in this section emanate from the literature review:

5.3.1 Contentious issues arising from the payment of salary and grade progression.

- The matter of salary progression resulted in a dispute between educator unions and government. The dispute arose from the inability of the DoE to

effect a smooth implementation of the agreement and the ensuing delay resulted in the unions demanding an automatic payment of salary progression. (refer to page 21 in chapter 2).

- At school level, the main focus of the process was reduced to the issue of salary and grade progression. An official of the DoE reminded the house at a cluster meeting for principals that “the process is not just about receiving money”. The official stated that integrity should be characteristic of an educator. Educators must be reflective and above all honest when completing their PGPs. That honesty must also be reflected in how DSGs score the educator when completing the summative evaluation. The summative evaluation indicates if the educator qualifies for a salary as well as a grade progression refer to page 21 in chapter 2).
- The high scores given to educators for certain performance standards (PS) were unrealistic in view of the fact that the same PSs appeared in the PGP as an area for development. In certain instances there was no correlation between scores and learner achievement. (refer to page 20 in chapter 2)
- The PM (Performance Management) agreement needs to tighten up on moderation of scores. Many educators do not record any developmental needs in their PGPs.
- Developmental needs should be stressed for personal growth.
- Educators at the maximum of their salary levels who do not qualify for salary progression is a matter of concern. This clause should be reviewed.

5.3.2 IQMS Training (refer to page 19 in chapter 2)

- According to the National DoE, training only commenced in 2004 because the extent of the implementation process exceeded expectations.
- The cascade model of training district and union members and then down to schools proved time-consuming.
- The quality of the training was a huge disappointment – the sessions were too brief and this compromised the quality of the training.

- The trainers conducted training in a mechanical way and this impacted negatively on educators' perceptions of IQMS.
- Many educators were left feeling perplexed, apprehensive and insecure about the process of which implementation at school level was mandatory and imminent.
- There are calls for the retraining of educators on certain aspects: how to interact with the PSs; how the IQMS components are integrated and how to complete the PGPs, evaluation forms and SIPs.
- The training of SBSTs (School Based Support Teams) is essential as this structure impacts significantly on WSE.
- A large majority of educators in the greater Gauteng Region have received training.
- Provision has been made to train newly appointed educators as well as those educators who missed the training in 2004 and 2005.

5.3.3 Implementation Issues (refer to page 15 of chapter 2)

- Commitment to Implementation is crucial. A strategy chosen but not implemented serves no purpose.
- High levels of uncertainty, turbulence and rapid change will render a strategy obsolete in the early stages of implementation.
- South Africa is amongst world leaders relating to education legislation and policy. The problem seems to emerge in relation to commitment and support for the implementation of policy.
- People at all levels need to be made competent and confident to implement policy.

5.3.4 Issues related to the DSG (refer to page 19/20 in chapter 2)

- There is a tendency by educators to choose their friends to serve on their panels.
- Educators are in many instances unable to sit in on DSG conferencing due to time constraints resulting from heavy teaching loads and other co-curricular or extra-curricular responsibilities.
- As a result of educators' many commitments, time frames are found to be constraining.
- Many educators have been found to display a negative attitude towards classroom observation (Page 8 in chapter 2).
- The supervision function of members of the SMT- in particular the HOD, must run concurrently with the intervention planned by the DSG. This arrangement is feasible as the HOD is expected to be part of the DSG of educators in his/her learning area team. Because DSGs are ultimately responsible for the development as well as for the summative evaluation of the educators in their panels, members of the DSG will have to play the role of both coach and referee (p8).

5.3.5 The School Improvement Plan (refer to page 20 in chapter 2)

- The completion of the SIP has raised many challenges.
- In many instances there is no correlation between the contents of the PGPs of educators and the SIP.
- District officials have on numerous occasions complained of the quality of the SIPs at meetings.
- The poor quality of the SIP can be attributed to the fact that many principals lack a basic understanding of IQMS.
- The SIP is meant to focus on the nine focus areas of WSE.
- The lack of common understanding of the SIP could have been avoided if schools were provided with a standardised template of the SIP at the outset.

- Districts failed to respond to this misunderstanding by not giving schools individual feedback on the contents of their SIPs. This resulted in contextual variation of SIPs for schools in the same district/geographical locality.

5.3.6 Allocation of resources (refer to page 14 and 15 in chapter 2).

- The DoE have to make provision for sufficient resources both in terms of learner support material as well as ensure successful strategy implementation, the allocation of resources must be aligned to the strategy.
- Quality in education is dependent on finances and the provision of funds.
- A lack of funds will seriously hamper adequate development and maintenance of infrastructure, teacher development and the provision of equipment and support material.
- Educator relations and actions are affected by the continuous rationalisation process which results in the redeployment of educators who are identified to be in excess at schools.
- The Morkel Model is used to determine the post provisioning of the school. According to a report by National DoE, human capital is the main resource that is required to ensure the smooth implementation of IQMS.
- Also impacting on the provision of resources is the Quintile Ranking Formula used to determine the funding of schools. Thus the lower 25% of schools receive the most resources, when district comparisons are made.

5.3.7 The role played by the district (refer to page 20 in chapter 2).

- Very often dates received at schools from district offices for intervention/meetings clash. There appears to be an absence of planning resulting in a lack of coordination between different units within the district.
- Good communication and dissemination of information regarding policy and policy implementation is essential.
- Under-resourced districts lack manpower which makes it difficult to render the necessary support, intervention, monitoring and tracking of the implementation process.

- The volume of paper work/documents required from schools are both cumbersome and an economic burden.
- Principals in general have serious reservations regarding the efficacy of district personnel with regard to the administration of important official documents submitted by schools to district offices. Very often schools are expected to resubmit documents that have been lost or misplaced at district level.
- Quality depends on good communication and dissemination of information about policy and policy implementation (p 17).
- Quality depends on all employees at whatever level, being confident and competent- and accountable (p 17).

5.3.8 Challenges facing school leadership.

- Strategic change requires strong leadership. (p 10).
- As a result of the complexity of the IQMS process, no single model on leadership will adequately address the challenges inherent in this instrument (p 10).
- Because of the hierarchical nature of school leadership, WSE requires that SMT members play a dual role – that of being an evaluator and at some stage, the one whose work is evaluated (p7).
- This complexity of role reversal as well as the range of expectations placed on school leadership will impact on the way in which school leadership views IQMS (p7).
- Schools have been bombarded with a plethora of new policies. This causes an innovation overload which in turn creates a turbulent policy environment (p 24).
- Because DSGs are ultimately responsible for the development as well as for the summative evaluation of the educators in their panels, members of the DSG will have to play the role of both coach and referee (p 27).

- The question arises: Should principals teach? (p 24). A number of principals indicated their support for the establishment of a support structure for principals (page 24).
- It is necessary to ascertain how practicable IQMS is in the current management paradigm (p 26).

5.4 EMPIRICAL FINDINGS

The following empirical findings emerged. The variety of these findings was clustered according to the 4 sections that represent the basic structure of the questionnaire. Statistical inferences were used to determine the impact of IQMS on school leadership. This was carried out according to the 3 factors that comprised the basic framework of the questionnaire.

In view of the limitations posed by a mini-dissertation, the researcher will document only significant findings with regard to the impact of IQMS on school leadership.

5.4.1 Findings with regard to respondents' understanding of IQMS

- The majority of educators indicated that they understand the purpose, processes and procedures of IQMS to a moderate extent - represented by an average mean factor score of 3.38. This preference for a moderate response could be indicative of the fact that in general educators are still uncertain of their understanding of this instrument.
- The English language group is shown to have the highest mean factor score (3.73) relating to understanding IQMS. . A plausible explanation could be the fact that in terms of understanding IQMS, English-speaking educators had an advantage over educators from other language groups as the IQMS training was conducted in English.

5.4.2 Findings with regard to respondents' believing in IQMS

The analysis relating to this factor revealed the following:

- While educators indicate that they have a moderate understanding of IQMS in general, a mean score of 2.79 indicates that educators believe the training they received has prepared them to a small extent for the implementation of IQMS.
- It was also established that in most cases (48.5%) the duration of the training was one day while a significant number (36.9%) indicated that the training lasted for half a day.
- Educators' perceptions indicate that they are not convinced that IQMS will result in principals becoming more accountable (factor mean score 3.28) or that it will improve the quality of schooling (factor mean score of 3.23).
- A factor mean score of 3.77 tending towards 4 indicates that educators believe to a large extent that IQMS will/has resulted in an increase in their workloads.
- Of all the post levels, educators on post level one are the least positive in terms of believing in IQMS.

5.4.3 Management and appraisal of educators

The following has been established from the data obtained in respect of the items in this factor:

- A large proportion (60.3%) of respondents indicated that lesson observation is necessary for educator development.
- Almost 50% of respondents agree that annual educator evaluation will contribute to professional growth.
- A significant number (43.1%) of respondents indicated that DSGs contribute to educator development.
- A large proportion (65.7%) of respondents agreed to a moderate to large extent, that all educators should be required to serve on DSGs.

- A large number of educators (65.9%) agree to a small extent that educators have sufficient time to serve on DSGs. This implies that educators do not have sufficient time to serve on DSGs.

5.4.4 Items from Section C of the questionnaire

- As indicated in chapter 4 of this study, the factor analytical process was unable to reduce the items in Section C of the questionnaire to an interpretable factor. However, in order to determine educator perceptions and opinions on the impact of WSE on schools, it is necessary to consider significant data that emerged from the analysis of individual items in this section:
- A large number of educators (66.5%) in the categories ranging from “moderate to large” indicated that WSE is judgemental by nature.
- A significant number of educators (64.5%) ranging from the “moderate to large” category indicated that educator turnover disrupts WSE.
- In the groups “moderate to a large extent”, 73.0% of respondents indicated that WSE serves as a tool to determine resource needs at a school.
- A large number of educators (77.5%) ranging from a “small to moderate extent”, indicated that WSE results in more resources being allocated to a school. This suggests that a significant number of educators are not convinced that WSE results in schools benefiting from more resources although this process is meant to serve this function.
- In the cross tabulated item: “Have district officials visited your school to support PMS” vs “ Have district officials visited your school to support the IQMS”, the following is indicated: 46.80% opted for a “yes” response while 53.20% opted for a “no” response. This suggests that district officials provided very little support to a large number of schools.

5.5 RECOMMENDATIONS

5.5.1 Recommendations regarding educators' understanding of IQMS

Based on the findings of this research, suggestions on how to enhance educators' understanding of IQMS could be achieved through processes like training, networking and more district support. To avoid repetition, specific recommendations with regard to these processes will be presented.

5.5.2 Recommendations regarding educators' believing in IQMS.

IQMS Training

- District officials and SMTs should be trained simultaneously. The cascade model of training district and union members, and then school personnel proved time-consuming and created more opportunities for misinterpretation of the process.
- The retraining of educators on specific aspects should be considered: how to interact with the PSs; how the IQMS components are integrated and how to complete the PGP, evaluation forms and SIPs.
- The quality of the training should not be compromised by officials who are not competent to facilitate training sessions. Experienced educators at school level could be identified to assist in this regard considering that they have first-hand experience with challenges faced during implementation.
- Training sessions should be made more intensive in order for educators to feel more confident about the process. This will address the turbulence experienced at the initial implementation of the process.
- To facilitate clarity during training, provision should be made to cater for the various black language groups - especially when a new strategy is launched.
- The training of SBSTs (School Based Support Teams) is essential as this structure impacts significantly on WSE. This structure is also directly

responsible for managing the process of identifying barriers to learning, in other words, facilitating effective learning for all learners.

Allocation of resources

- To ensure successful strategy implementation, the allocation of resources must be aligned to the strategy.
- A lack of funds will seriously hamper adequate development and maintenance of infrastructure, teacher development and the provision of equipment and support material. To this end, it is necessary to revisit the Quintile Ranking Formula used to determine the funding of schools.
- The procurement process regarding LTSM for Non-Section 21 schools is cumbersome and erodes already inadequate funds. This process also needs to be revisited.
- Adequate human capital should be provided to ensure that heavy workloads of educators do not prevent educators from contributing effectively to DSGs thereby hampering the successful implementation of IQMS.
- The salary positions of educators on post levels 2 and higher in relation to the improved positions of post level 1 educators must be investigated by a task team as a matter of urgency.
- The rationalisation process for educators should also be reviewed as this result in educator turnover that could disrupt WSE. Educator apathy arising from this process may cast a damper on efforts to ensure the smooth implementation of IQMS.
- The process of filling vacancies at schools should be planned in such a way that educator turnover takes place at the beginning of the academic year.
- It is imperative that the WSE process delivers on promises of more resources being allocated to schools where it is needed. This will lend credibility to the WSE process.

5.5.3 Management and appraisal of educators

The researcher is making a strong recommendation for the revision of the Morkel model used for post provisioning for these reasons:

- Because of special subjects like music and computer literacy, secondary schools are presently enjoying a post provisioning of 35:1 learner/educator (LE) ratio. This happens at the expense of primary schools where the LE ratio of 40:1 is applied. Thus, for DSGs to be effective, the LE ratios for both primary and secondary schools should decrease – this is possible by providing additional posts for both primary and secondary schools.
- Presently, the principal is counted as a full teacher in terms of post provisioning. The Morkel Model should be revised to exclude the principal from the equation thereby providing schools with an additional post. This arrangement will provide some relief to both the principal as well as educators in terms of managing the appraisal process effectively.
- As a result of the post provisioning formula, the teaching loads of educators and SMT members in most instances exceed the stipulated quota as per Personnel Administrative Measures (PAM), (C -62-63).
- This formula also disadvantages schools in disadvantaged communities that do not have the necessary resources to offer special subjects like Music, Computer Science or Technical Drawing.
- School leaders should seize on innovations they are exposed to, and adapt them to fit their transformational agendas.
- Members of management should make every effort to be multi-skilled in order to do justice to the demanding task of managing an organisation effectively.

5.5.4 Items from Section C of the questionnaire

District Support

While it is important for districts to track the implementation process, it is essential to provide the necessary support to educators as well as school leadership with

regard to IQMS, in particular to PM which, by virtue of the monetary rewards attached to it, makes it a contentious issue between educators and the SMT. This support can take the form of:

- Ensuring that an effective communication strategy is in place so that all stakeholders are timeously informed of all new developments.
- Ensuring that stakeholders have a common understanding of all developments, in particular new policies.
- Establishing practices at administrative level to avoid the loss of documents forwarded by schools.
- Ensuring that there is a coordination of management plans between different units within the district.
- Availing schools with the district management plan by November of a current year for schools to align their own year plans to that of the district for the following year.
- National and Provincial Departments need to ensure that the relevant units at districts have adequate human resources to facilitate the monitoring and support functions for schools.
- Initiating intervention programmes for the induction of all educators appointed to promotion posts.
- Implementing an external moderation procedure to monitor the summative evaluation scores of educators.

5.6 LIMITATIONS OF THIS RESEARCH STUDY

The researcher notes the following limitation with regard to this study:

The research study was limited to five out of twelve districts in Gauteng. This limitation resulted from the nature of a mini-dissertation which had to be restricted to approximately 80-100 pages. Reporting on all districts within GDE would have required more time and space.

5.7 RECOMMENDATIONS FOR FURTHER RESEARCH

The following topics arise from the empirical research of this study:

- The impact of iQMS in an under-resourced environment.
- The implementation of quality management systems enhances the professional development of educators.
- Policy innovation is aligned to resource allocation.
- A School Improvement Plan is a necessary feature of whole school improvement.
- Innovation overload causes turbulence in whole school development.
- The Performance Management System as an incentive for the professional development of educators.

5.8 CONCLUSION

The literature and empirical findings documented by the researcher validated the need for research on the impact of IQMS on school leadership.

Because of its complex nature, the implementation of IQMS has resulted in significant challenges for all stakeholders, in particular school leadership. It is hoped that the findings and recommendations of research studies like this one will serve as a guiding force for future policy implementation initiatives.

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ANNEXURE A



QUESTIONNAIRE

SECTION A: PERSONAL AND GENERAL INFORMATION

Please answer the following questions by circling the correct code or by filling in your answer in the space provided

EXAMPLE

What is your gender ? If your gender is female then circle as follows:

1. What is your gender ?	
Female	01
Male	02

1. What is your MOTHER TONGUE ? (choose one response only)	
Afrikaans	01
English	02
Sesotho	03
IsiZulu	04
IsiXhosa	05
Setswana	06
Xitsonga	07
ThsiVenda	08
Siswati	09
<i>IsiNdebele</i>	10
Sepedi	11
Hindi	12
Gujerati	13
Tamil	14
Other (Specify)	15

2. What is your GENDER ?	
Female	01
Male	02

3. Which EMPLOYEE ORGANISATION (Union) do you belong to ? (tick all applicable)	(√)
NAPTOSA	
SADTU	
SAOU	
Other (specify)	

4. How many years of TEACHING EXPERIENCE do you have? (e.g. If you have 32 yrs then enter <input type="text" value="3"/> <input type="text" value="2"/>)	
5. What is your current POST?	
Principal	01
Deputy Principal	02
Head of Department	03
Educator	04

6. What is the NATURE OF your SCHOOL?	
Primary	01
<i>Secondary</i>	02
Combined (primary and secondary)	03
LSEN School	04
Other (<i>specify</i>)	05

7. What is the NUMBER OF LEARNERS currently enrolled at your school ?	
Fewer than 500 learners	01
501 to 700 learners	02
701 to 1000 learners	03
<i>More than a 1000 learners</i>	04

8. In which DISTRICT are you employed ?	
Johannesburg East	01
Johannesburg South	02
Johannesburg West	03
Johannesburg North	04
Gauteng North	05
Gauteng West	06
Tswane North	07
Tswane South	08
Ekhuruleni East	09
Ekhuruleni West	10
Sedibeng East	11
Sedibeng West	12

9. Which of the following LEARNING AREAS are you responsible for? (you may tick more than one)	(√)
Languages	
Mathematics	
Natural science	
Human and social science	
Economic and management science	
<i>Arts and culture</i>	
Life orientation	

10. How many DEVELOPMENTAL SUPPORT GROUPS (DSGs) are you involved in? (Circle the appropriate number)	
None	01
One	02
<i>Two</i>	03
Three	04
Four or more	05

SECTION B: THE INTEGRATED QUALITY MANAGEMENT SYSTEM (IQMS)

Please remember this is not a test of your competence. Mark your opinion by circling the appropriate number/code on the scale provided for each question.

1. Have you received training ?

1	Yes	2	No
---	-----	---	----

NB! If “yes” proceed to question 2. If “no” proceed to Section C
Circle the applicable number to indicate your response

2. When did you receive training ?

Between January 2004 and March 2004

April 2004 and June 2004

July 2004 and September 2004

October 2004 and December 2004 .

Since January 2005

01
02
03
04
05

3. How long before training commenced were you notified?

Within a day

01

Within a week

02

Within a month

03

04

More than a month

4. How long did the training last ?

Half a day

01

One day

02

2 to 3 days

03

4 days or longer

04

5. Where did the training take place?

At my school

01

At a neighbouring school

02

At another venue outside my district

03

Circle the applicable number to indicate your response

6. Has the principal of your school received training?

Yes	1	No	2	Do not know	3
-----	---	----	---	-------------	---

Please answer each of the following questions using the 5-point scale provided. Indicate your response by circling the number corresponding to your answer.

- 1 To no extent
- 2 To a small extent
- 3 To a moderate extent
- 4 To a large extent
- 5 To a very large extent

EXAMPLE

To what extent are educators involved in school management matters?
(If educators are moderately involved, then circle option 3)

NO EXTENT	1	2	3	4	5	VERY LARGE
-----------	---	---	---	---	---	---------------

EXTENT

To what extent do you understand:

7. The purpose of IQMS?

NO EXTENT	1	2	3	4	5	VERY LARGE
-----------	---	---	---	---	---	------------

8. The processes of IQMS?

NO EXTENT	1	2	3	4	5	VERY LARGE
-----------	---	---	---	---	---	------------

9. The procedure to be followed in IQMS?

NO EXTENT	1	2	3	4	5	VERY LARGE
-----------	---	---	---	---	---	------------

10. To what extent has the training you received prepared you for implementing IQMS?

NO EXTENT	1	2	3	4	5	VERY LARGE
-----------	---	---	---	---	---	------------

To what extent do you believe:

11. IQMS will result in principals becoming accountable leaders?

NO EXTENT	1	2	3	4	5	VERY LARGE
-----------	---	---	---	---	---	------------

12. IQMS will improve the quality of schooling?

NO EXTENT **su**

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

? VERY LARGE

NO EXTENT

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

 VERY LARGE

SECTION C WHOLE SCHOOL EVALUATION (WSE)

Please answer each of the following questions using the appropriate scale.

The five-point scale implies the following response:

- | |
|---|
| <p>1. To no extent
2. To a small extent
3. To a moderate extent
4. To a large extent
5. To a very large extent.</p> |
|---|

Circle the number corresponding to your answer.

EXAMPLE

To what extent are educators involved in school management matters?

(If educators are moderately involved, then circle option 3)

NO EXTENT

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

 VERY
EXTENT LARGE

1. Has your school undergone Whole School Evaluation?

Yes	1	No	2	Do not know	3
-----	---	----	---	-------------	---

NB! ANSWER THE NEXT TWO QUESTIONS ONLY IF YOUR ANSWER IS "YES" TO QUESTION 1 ABOVE. IF "NO" PROCEED TO QUESTION 4.

2. At the end of WSE your school received a report?

Yes	1	No	2	Do not know	3
-----	---	----	---	-------------	---

3. The school received support for improvement after WSE?

Yes	1	No	2	Do not know	3
-----	---	----	---	-------------	---

Please indicate the extent to which you agree with each of the following statements

4. WSE is judgmental by nature

NO EXTENT

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

 VERY LARGE

5. Educator turnover disrupts WSE

NO EXTENT

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

 VERY LARGE

6. WSE serves as a tool to determine resource needs at a school.

NO EXTENT

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

 VERY LARGE

7. WSE results in more resources being allocated to a school

NO EXTENT

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

 VERY LARGE

Circle the appropriate number to indicate your response

8. Has your school started to implement the Performance Management System(PMS)?

Yes	1	No	2	Do not know	3
-----	---	----	---	-------------	---

NB! IF YOUR ANSWER IS "YES" TO QUESTION 8 ABOVE, KINDLY ANSWER ALL THE QUESTIONS THAT FOLLOW.

IF "NO", PLEASE PROCEED TO QUESTION 10.

9. Does the SMT of your school regularly monitor the implementation of PMS?

Yes	1	No	2	Do not know	3
-----	---	----	---	-------------	---

10. Have District officials visited your school to support the implementation of PMS?

Yes	1	No	2	Do not know	3
-----	---	----	---	-------------	---

11. Have District officials provided support with the implementation of IQMS?

Yes	1	No	2	Do not know	3
-----	---	----	---	-------------	---

SECTION D MANAGEMENT AND APPRAISAL OF EDUCATORS

Please answer each of the following questions using the following 5-point scale. Indicate your response by circling the number corresponding to your answer.

1. No Extent
2. Small Extent
3. Moderate Extent
4. Large Extent
5. Very Large Extent

EXAMPLE

To what extent do educators welcome constructive feedback.
(If educators do not welcome constructive criticism at all, then circle 1).

NO EXTENT	1	2	3	4	5	VERY LARGE EXTENT
-----------	---	---	---	---	---	----------------------

To what extent do you believe that:

1. Lesson observation is necessary for educator development?

NO EXTENT	1	2	3	4	5	VERY LARGE
-----------	---	---	---	---	---	------------

2. DSG's (Appraisal Panels) contribute to educator development?

NO EXTENT	1	2	3	4	5	VERY LARGE
-----------	---	---	---	---	---	------------

3. Educators have sufficient time to serve on DSG's?

NO EXTENT	1	2	3	4	5	VERY LARGE
-----------	---	---	---	---	---	------------

4. All educators should be required to serve on a DSG?

NO EXTENT	1	2	3	4	5	VERY LARGE
-----------	---	---	---	---	---	------------

5. Annual educator evaluation will contribute to professional growth.

NO EXTENT	1	2	3	4	5	VERY LARGE
-----------	---	---	---	---	---	------------

THANK YOU FOR YOUR PARTICIPATION.

ANNEXURE B



IQMS AUDIT TOOL

Province: _____ District _____

Name of School: _____

	Yes	No	
1. Are schools provided with ELRC Collective Agreement 8 of 2003?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Is every teacher provided with a copy of the Collective Agreement 8?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Has training been done in every school?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Is every educator familiar with the IQMS process?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. DO educators know which performance standards are applicable to them?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Did the principal facilitate the establishment of the SDT in a democratic manner?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Are all IQMS structures in place at school (SDT, DSG, IQMS co-ordinator)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Are SMT's effective in the planning and implementation of IQMS?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Do SMT's inform educators of INSET and other programmes that are being offered in respect to professional development?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Is the SDT and the DSG constituted correctly?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Is the IQMS management plan for the school displayed in an appropriate place?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Is there a schedule of all DSG members?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Are the SDT's performing their IQMS tasks effectively?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Are all IQMS records and documentation filed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Is the SIP readily available?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Does the school have an evaluation roster?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Is there any evidence of the DSG providing mentoring and support to educators?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Have all educators conducted self-evaluation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Is there any evidence of pre-evaluation discussion before the base-line evaluation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. Who is involved in examining educators PGP's;			
DSG <input type="checkbox"/>			
SDT <input type="checkbox"/>			
Subject advisor <input type="checkbox"/>			

21. Are educators PGP's utilised in the development of the SIP?
22. Do educators provide documentary evidence i.r.o. performance standards outside classroom observation?
23. Is there any evidence of teacher dissatisfaction w.r.t. the manner in which evaluation is conducted?
24. Is there any evidence of internal moderation of scores?
25. Internal moderation was conducted by:
 Principal SMT member IQMS co-ordinator
26. Is there any evidence of external moderation?
27. External moderation was conducted by:
 Circuit manager Subject advisor Other
28. Is there any evidence of educator developmental need being addressed by school?
29. Does the District office provide development programmes to schools as per the SIP?
30. Are DIP's available at the District office?
31. Does the SDT compile annual IQMS report?
32. Does the District office make use of IQMS annual reports w.r.t. INSEt and other programmes?
33. Is there any evidence of "contextual factors" being used to adjust scores?
34. Are adjustments of scores effected in terms of the Collective Agreement
 Yes No Not applicable
35. Are intervention programmes provided to those educators who have achieved Below the level of satisfaction?
36. Are summative evaluation scores analysed by:
 School
 District office
 IQMS component at Provincial level
37. Have all educators qualified for salary progression in this school?
38. Have all new teachers been trained on the IQMS process?
39. Are there any of the "older" teachers who still require re-training?
40. Are teachers given the opportunity to clarify areas of concern?

I CERTIFY THAT THE ABOVE INFORMATION CONTAINED IN THIS DOCUMENT IS A TRUE REFLECTION AS THEY HAVE BEEN PERSONALLY VERIFIED BY ME.

Audit conducted by: _____

Date: _____

Print Name: _____

Capacity: _____

(Source: GDE)

