



# **Advanced Diploma School Leadership and Management**

Leading and Managing Teaching and Learning  
in the School

Module 2

Department of Basic Education



**basic education**

Department:  
Basic Education  
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**Department of Basic Education**

**Leading and Managing Teaching and Learning in the School**

**A module of the Advanced Diploma: School Leadership and Management**

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# Acronyms and Abbreviations

AST	Advanced Skills Teacher
CAPS	Curriculum and Assessment Policy Statement
CoP	Community of Practice
CPTD	Continuous Professional Teacher Development
DBE	Department of Basic Education
ECD	Early Childhood Development
ELO	Exit Level Outcome
ELRC	Education Labour Relations Council
HEI	Higher Education Institution
HOD	Head of Department
ICT	Information and Communication Technology
IQMS	Integrated Quality Management System
LMS	Learning Management Systems
LRC	Learner Representative Council
MOOC	Massive Open Online Course
NCS	National Curriculum Statement
NQF	National Qualifications Framework
OBA	Outcomes-based Assessment
OBE	Outcomes-based Education
OER	Open Educational Resources
PLE	Personal Learning Environments
PP	Professional Portfolio
SACE	South African Council for Educators
SASP	South African Standard for Principalship
SDT	Staff Development Team
SGB	School Governing Body
SMT	School Management Team
WPP	Workplace Project
WSV	Within-school Variation





# Module 2: Leading and managing teaching and learning in the school

## AdvDip (SLM) Course Modules

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**Module 1** Professional Portfolio and Workplace Project

**Module 2** Leading and managing teaching and learning in the school



**Module 3** Leading and managing extra- and co-curricular activities

**Module 4** Leading and managing people and change

**Module 5** Working with and for the wider community

**Module 6** Leading and managing the school as an organisation

**Module 7** Working within and for the school system

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# Overview

Welcome to *Module 2: Leading and managing teaching and learning in the school*. This module is all about the leadership and management of teaching and learning. Underpinning the module are the principles and values of the Constitution of South Africa, the South African Bill of Rights and the South African Schools Act. This Act informs educational transformation in South Africa. These principles and values are also clearly reflected in the *South African Standard for Principalship: enhancing the professional image and competencies of school principals* (DBE, 2015). Alan Clarke, a very successful South African school principal, says this about leaders and managers:

*Leaders look outward and to the future. To them success is derived from future-focused change. Managers look inward, and to the present. To them success is derived from improved systems of control, predictability and order. Strong leadership and good management are both essential for the success of a school, and a good principal is skilled at both. They also understand that circumstances determine whether a given situation requires more leadership or better management.* (Clark, 2007: 1)

The module introduces and explores the concept of the school as a learning organisation – one which can promote a culture of quality teaching and learning, dedicated to constant monitoring, evaluation and improvement. It will also consider the issue of context, school culture and how the physical environment of the school may impact on the quality of the core business of teaching and learning. This is intended to lead you into an exploration of the necessary processes, and the many challenges, of effectively planning, implementing, monitoring and evaluating curriculum. It will enable you also to understand that curriculum often needs to change and reinvent itself in line with the changing needs of a changing society.

## Module learning outcomes

By the end of this module you should be able to:

1. Reflect upon and demonstrate an understanding of the school as a learning organisation which ensures quality learning for all.
2. Reflect upon and demonstrate understanding of the role of leadership across the school, especially Heads of Department/Phase and middle managers in managing teaching and learning in the classrooms and monitoring teaching and learning within their department/phase.
3. Demonstrate the personal qualities, attributes, pedagogic knowledge and professional competencies necessary for effective leadership and management of teaching and learning.
4. Reflect upon and demonstrate an understanding of what constitutes an instructional leader and the importance of this role.
5. Lead and manage the planning, implementation, monitoring and evaluation of teaching to ensure quality learning for all in the context of national, provincial and school policy.
6. Demonstrate and be able to apply relevant content knowledge in the design, implementation and evaluation of teaching and learning and the organisation of the school environment.
7. Demonstrate an understanding of the relationship between managing teaching and learning, financial

- principles, the links to resource management, and school development planning.
8. Demonstrate an understanding of the link between resource inputs and educational outcomes in own school context.
  9. Understand and demonstrate the integration of curriculum and staffing needs, and decisions with the budgeting process.
  10. Demonstrate knowledge and understanding of the importance of the creation of a caring, disciplined and effective learning organisation.

## Units

There are three units in this module.

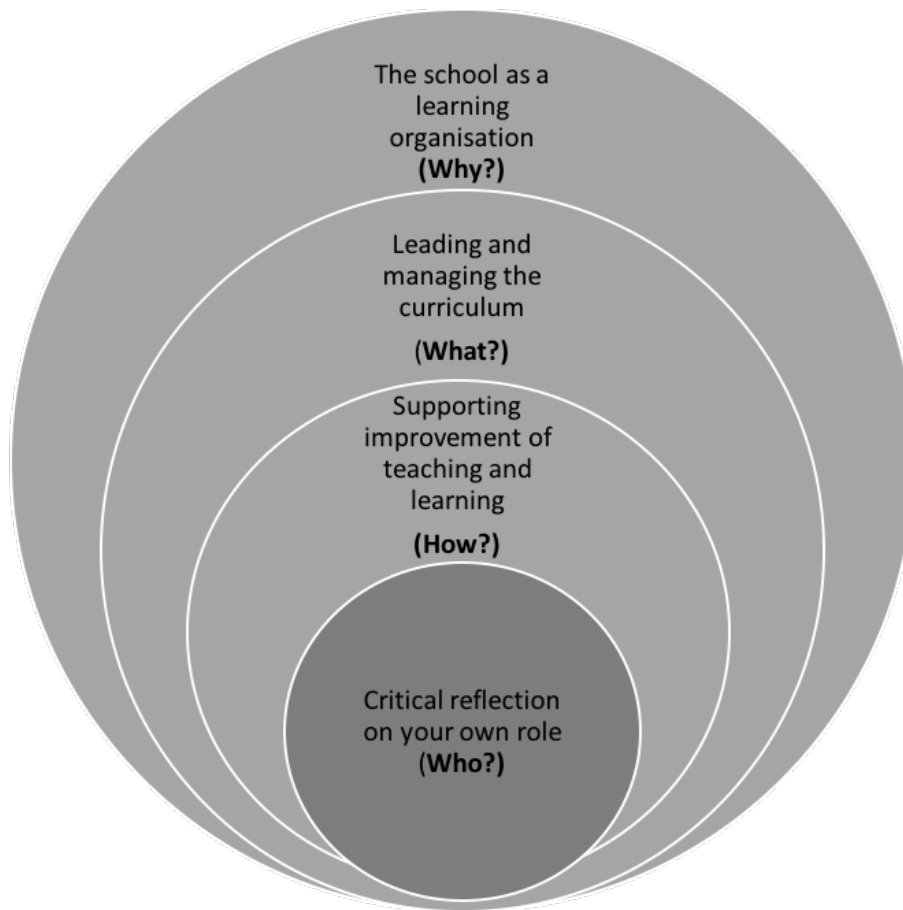
**Unit 1: Instructional leadership in a learning organisation** starts with the big picture. It explores the notion of the school as a learning organisation and tries to unpack your role as an instructional leader within the school. It addresses the question of WHY this module is needed.

**Unit 2: Planning, implementing and monitoring a curriculum** explores the specific challenges of implementing a nationally-determined school curriculum in diverse teaching and learning contexts. It focuses on WHAT the key curriculum issues are that require explicit attention.

**Unit 3: Managing teaching and learning for school improvement** then explores specific strategies and approaches that you might find useful in fulfilling your role. It therefore focuses on HOW to manage teaching and learning.

Running throughout the three units, you will constantly reflect on your own role and practice, and how you can support others.

This structure of the module is illustrated in Figure 1.



**Figure 1: Module overview**

## Module credits and learning time

This module carries 18 credits. This is equivalent to 180 notional learning hours.

It is anticipated that you will take approximately 180 hours to complete the module successfully. The 180 hours will include contact time with your Higher Education Institution (HEI), reading time, research time and time required to write assignments. It is also expected that at least half of your learning time will be spent completing practice-based activities in your school. This will involve your individual work on activities, and it will also require you to discuss these school-focussed activities with your colleagues. Each activity in this module indicates the suggested time for completion. All these reflective and formative activities will form part of the Professional Portfolio (PP) and Workplace Project (WPP) which is explained in detail in *Module 1: Professional Portfolio and Workplace Project*. In addition, information and assessment requirements will be provided by your HEI.

## Exit level outcomes

This module contributes to the following eight of the nine exit level outcomes (ELOs) of the AdvDip (SLM) qualification:

## **ELO 2**

Demonstrate accountability and take full responsibility for managing school leadership, teaching and learning, whilst engaging in school activities, decision-making and projects, and ensuring the responsible use of school and community resources in performing workplace tasks and projects.

## **ELO 3**

Reflect on and develop own personal leadership attributes and characteristics, collaboration, knowledge of systems and processes, and demonstrate the ability to work effectively with others in the school context and beyond.

## **ELO 4**

Gather, validate, critically reflect and evaluate information, and apply theories and knowledge around pedagogy, and leadership and management to address complex problems encountered within the school and educational context, in and outside the classroom.

## **ELO 5**

Demonstrate the ability to manage people and teams empathetically and firmly, encourage collaboration and develop and maintain sound working relationships with different stakeholders over time, and within a range of contexts such as collective bargaining, negotiation and dispute resolution.

## **ELO 6**

Select, and apply effective and innovative organisational systems and processes (such as HR, Finance, Safety, IT etc.) to manage resources in a way that aligns with the school's vision and mission, as well as to ensure compliance with legislation, policy and best practice in addressing a range of organisational needs.

## **ELO 7**

Plan for, select and manage staff and teams, assess and evaluate the performance of school stakeholders, and work together to improve performance whilst insisting on full accountability for performance.

## **ELO 8**

Model ethical and values-driven leadership that adheres to professional standards of governance and Codes of Conduct for educators, and articulate why certain decisions are taken and standards are applied.

## **ELO 9**

Communicate effectively and clearly with all school stakeholders across a range of issues and circumstances by using arguments and rationale effectively.

## Recommended readings

Bush, T. & Glover, D. 2016. School leadership and management in South Africa: findings from a systematic literature review. *International Journal of Educational Management*, 30(2): 211–231.

(You can access the above article by clicking on this link <https://doi.org/10.1108/IJEM-07-2014-0101> and then downloading the PDF version by clicking on the PDF icon on the right-hand side of the page.)

Christie, P. & Monyokolo, M. (Eds). 2018. *Learning about sustainable change in education in South Africa: the Jika iMfundo campaign 2015–2017*. Johannesburg: Saide.

(You can download this report from <https://www.saide.org.za/books/sustainable-change/>. All of the chapters in this report are relevant to this module but *Chapter 2* is particularly useful in providing a theory of change for leading and managing teaching and learning.)

In addition to the recommended readings, it is suggested that you access and read some of the literature cited in the list of references at the end of the module, especially those related to issues where you feel the need for further clarification.

You will also need access to the relevant Department of Basic Education's Curriculum and Assessment Policy Statement (CAPS) documents (DBE, 2011) for the subjects you teach and lead, as well as the current national policy on assessment and any relevant provincial guidelines. You will also need to check your own school's policy and procedure guidelines regarding teaching, learning and assessment.





# Unit 1: Instructional leadership in a learning organisation

*Good teaching and good learning is a school's bottom line. It is what schooling is about and is the core function of a school ... The question that should be uppermost in a principal's mind should be, "What must we do to make good teaching and learning happen, and how will I know what is happening?" (Clarke, 2007: 203)*

## Introduction

This first unit explores *why* principals and aspirant school principals need to focus on their role of leading and managing teaching and learning. You will explore ideas related to the school as a learning organisation and how this concept links to school effectiveness and improvement research. You will then examine the role of school culture, instructional and distributed leadership practices, and the role of professional development in ensuring continuous improvement in the quality of teaching and learning. This will set a foundation for Unit 2 which examines some of the key issues involved in implementing the current school curriculum.

The unit has been arranged into two sections, to help you understand these key issues:

**Section 1:** What is your role in managing teaching and learning?

**Section 2:** Instructional leadership in the learning school.

### Unit 1 learning outcomes

By the end of this unit, you should be better able to:

1. Reflect upon and demonstrate an understanding of the school as a learning organisation which ensures quality learning for all.
2. Reflect upon and demonstrate understanding of the role of leadership across the school, especially Heads of Department/Phase as middle managers in managing teaching and learning in the classrooms and to monitor teaching and learning within their department/phase.



# Section 1: What is your role in managing teaching and learning?

In the *South African Standard for Principalship* (SASP), the Department of Basic Education (DBE) states that instructional leadership is one of the five core responsibilities of a school principal (DBE, 2015: 11). As a principal, or as an aspirant principal currently holding departmental or phase responsibilities, you are a leader and manager in your school. You have a key role to play in the school's development and in the means of ensuring that quality teaching and learning take place, both as a whole school focus and within your own areas of expertise and influence. Your focus should be the expectation that all the learners in your school can improve their knowledge and develop to the best of their ability; that all teachers will teach and support the development of learners; and that teachers themselves will continue to build upon their own professional knowledge and skills as lifelong learners. In addition, the wider school community should be encouraged and assisted to support the school in this quest, by the principal, the school management team (SMT) and the school governing body (SGB).

However, no school has the perfect environment or conditions, and all schools face challenges of varying types. In South Africa the inequality between schools in the provision of financial, material and human resources and in existing infrastructure and social conditions, is widely acknowledged. This applies to both urban and rural areas, and compounds these challenges (Bloch, 2009; Christie *et al.*, 2010; Fleisch, 2008; Maringe & Moletsane, 2015). The quality of teaching and learning in many South African schools is known to be adversely affected by these factors, and this is particularly acute in areas of South Africa where schools are located in impoverished communities. In these communities, multiple deprivations [lacks and challenges] are apparent. These include, child-headed households, lack of housing, basic services and health provisions (Chikoko, Naicker & Mthiyani, 2015; Faulkner, 2015; Mbokazi, 2015). Yet there are examples of schools in impoverished communities which have achieved positive results in their teaching and learning, despite the disadvantages and deprivations of their community contexts (Christie, Butler & Potterton, 2007).

The central focus of this module is the provision of quality teaching and learning as the core purpose of education. This focus acknowledges that *context* plays a significant role in determining the enabling [empowering] factors as well as the complexity of the role of principals and school management teams in this work (Kaparou & Bush, 2016).

The module encourages principals and other school leaders to understand that there is no one way, or right way, to lead a learning school, although there is research to support the argument that some kinds of practices are likely to be more effective than others. The module suggests that leaders should adopt a critical perspective, by constantly questioning how to improve teaching and learning in *their* schools, given *their* context, community and resources. The module argues that it is by analysing the specific enablers, constraints and/or difficulties presented in your context that you, as a leader, can determine what will be the most effective processes for you to adopt to ensure continuous improvement in the quality of teaching and learning through a constant focus on learning and innovation as an organisation.

## Leading the learning school

This unit places the emphasis on the school as a learning organisation, and the role of the school principal as the curriculum, or instructional, leader. It focuses on the relationship between academic performance and achievement, school culture and instructional leadership – these can be described as the factors that influence the learning culture and ethos of the school. Based on the knowledge that each school's individual culture, whether it is positive or negative, affects learner performance, the unit argues that the quality of teaching and learning and, therefore, the standard of academic achievement, is directly related to the quality of instructional leadership. The unit also focuses on ways in which schools can maintain, and improve, with regard to all of these issues. So instructional leaders need to provide a vision for future practice and influence other teachers in the school towards attaining that vision. However, instructional leaders should also build or maintain systems and processes for data collection, analysis and management so that decisions made about teaching and learning are based on reliable evidence.

While schools can be distinguished from other sites of professional practice such as hospitals or legal firms by their focus on learning, not all schools are necessarily learning organisations. The next section explains why.

## The school as an organisation

The term *organisation* can be used to describe a wide range of social institutions from private businesses to public schools. The term implies groups of people working together in different ways to achieve common goals, a process that sometimes results in conflict and changes of approach. Researchers have argued over several decades that schools are organisations (Fidler, 1997; Handy, 1984, 1993). For example, Gultig and Butler (2002: 15) state that “any group that works together in a planned, coordinated way to achieve some common purpose could be described as an organisation”. The characteristics of a school as an organisation are explored in *Module 6: Leading and managing the school as an organisation*. Davidoff and Lazarus (2002) identify the following components of the school as an organisation: culture, identity, strategy, structures and procedures, technical support, human resources, leadership, management and governance, and context at micro/community, macro/national and global levels. However, this module focuses more narrowly on the notion of the school as a *learning* organisation.

## The school as a learning organisation

Today's schools must equip learners with the knowledge and skills they'll need to succeed in an uncertain, constantly changing tomorrow. But many schools look much the same today as they did a generation ago, and too many teachers are not developing the pedagogies and practices required to meet the diverse needs of 21st-century learners.

In response to the challenge of making schooling more relevant, a growing body of scholars, educators and policy makers is making the case that schools should be reconceptualised as “learning organisations” that can react more quickly to changing external environments, embrace innovations in internal organisation, and ultimately improve learner outcomes.

### Activity 1: Is your school a learning organisation?

**Suggested time:**

45 minutes

**Aim:**

The purpose of this activity is to help you think about what makes a school a learning organisation and how, and if, this applies in your context.

**What you will do:**

1. Write a paragraph (10–12 typewritten lines in length) explaining what *you* understand a learning organisation to be.
2. Now discuss your response with a member of your school-based community of practice (CoP).
3. Do your responses agree? If there are differences, why do you think this is?
4. Try to agree on a shared definition of *a learning organisation*.
5. Your shared definition should help you to decide if your school is a learning organisation. If not, what might you need to do to move your school towards being a learning organisation?
6. Keep your response in your Learning Journal as part of your Professional Portfolio (PP) discussed in *Module 1: Professional Portfolio and Workplace Project*.

**Discussion of the activity**

You should now consider if your definitions, both individual and shared, agree with the discussion that follows.

In understanding and engaging with the concept of schools as learning organisations, it is useful to start by considering that schools differ from other organisations in that their primary focus should be on teaching and learning. In other words, schools can be more accurately described as *learning organisations*, in a way that other organisations may not be. A learning organisation is, however, more than a place that simply focuses all its efforts on teaching and learning. Rather, it is an organisation in which change is welcomed instead of being feared and where constructive change is part and parcel of the organisational ethos [organisational philosophy or culture]. Being open to recognising errors or weaknesses in the ways in which teachers teach and assess sometimes involves asking uncomfortable questions. It also involves gathering and interrogating data objectively, questioning your and others' underlying assumptions and then being willing to change practices in light of what the *data* tells you rather than simply how you personally feel about the issue (Argyris, 2000; Christie & Lingard, 2001; Clarke, 2007). Being able to do this requires a combination of forward-looking and goal-oriented leadership, and the effective management of structures and processes that support quality teaching and learning. In addition, in a learning organisation, there needs to be wise and careful implementation of the authority that goes with the positions of Head of Department, Deputy Principal and Principal in order to respond critically to policy expectations on the one hand and contextual realities on the other (Christie, 2010).

In 1994, Peter Senge wrote an influential book on the idea of a learning organisation and in the following year he participated in an interview on schools as learning organisations. In this interview he argued that

most schools were *not* learning organisations, explaining that:

*Teachers don't work together: there's very little sense of collective learning going on in most schools. ... A second dimension of the problem is that educational institutions are designed and structured in a way that reinforces the idea that my job as a teacher is as an individual teaching my kids. (Senge in O'Neil, 1995)*

Senge goes on to argue that being a learning organisation is not a once-off event like developing a school vision statement, suggesting:

*For anybody really serious in this work, you'll spend 20 to 40 percent of your time – forever – continually getting people to reflect on and articulate what it is they're really trying to create. It's never ending. (Senge in O'Neil, 1995)*

Elmore (2008) suggests that in fact there are only three ways to improve the opportunity for effective and successful learning, these are – by raising the level of the content that learners engage with; by increasing the skills and knowledge of teachers to teach that content effectively; and by increasing the level of learners' active learning or engagement with the content. The importance of the latter, supporting learners' active engagement with content, is supported by both international studies (for example Bernard, Abrami & Borokhovski, 2009) and local studies (for example Strydom & Mentz, 2010). This is not to argue that teachers should just add more content. Rather it is about using a diversity of learning resources and media (e.g. speech, text, audio, video, animations and so on) so that information is presented in different ways from different sources, and then creating learning activities that help learners, both individually and together, to create and justify new understandings.

Among the many interventions teachers might make to improve learning, recent experience in South Africa suggests the following areas might usefully be prioritised:

- systematic planning for curriculum coverage;
- curriculum monitoring to check the extent to which what was planned has been achieved and to take corrective action where necessary; and
- continually working as a team to address contextual realities such as multi-grade classrooms and lack of parental involvement (Maphalala *et al.*, 2018).

You will be able to consider in more depth the process of change and change management within organisations in *Module 4: Leading and managing people and change*, and *Module 6: Leading and managing the school as an organisation*. This unit argues that if all those involved in the school and its activities constantly and systematically reflect on their practices, make appropriate adjustments, and effect necessary change as a result of new insights gained through this reflection, then it can be called a learning organisation or a *learning school*. Such a school, according to Davidoff and Lazarus's (2002) research in South African schools, is one in which people development and organisational development are complementary aspects of whole school development. They regard each one as contributing in its own way to making the school more effective and, therefore, more *successful* in what it does.

The notion of a school as a learning organisation can, however, be contested [questioned] and you should consider this carefully to form your own opinions and make a reasoned judgment. You might find it useful to

engage with Senge's practical field book (Senge, 2012), which is based on his earlier seminal [important and very influential] research on learning schools. Essentially Senge argues for a systems perspective, a realisation that many different factors impact on the quality of teaching and learning at classroom, school and community levels and each context is unique. Members of the school community need then to work together to maintain an environment that is conducive to continuous improvement. Each member of the community has something to contribute to the process of innovation to improve the quality of teaching and learning. In the South African context, you might like to look at Moloji's (2010) research as well as the *Jika iMfundo* initiative (Christie & Monyokolo, 2018). To access the *Jika iMfundo* publication you can refer to the reference list at the end of this module or access it online for free at: <https://www.saide.org.za/books/sustainable-change/>.

As you will learn in *Module 4: Leading and managing people and change*, keeping all staff informed and involved is the first priority in getting their support for, and commitment to, change. It is argued that communicating and sharing information with parents/guardians, external stakeholders, teachers and learners, will increase the effectiveness of learning. *This is considered a key factor in the successful leadership and management of those schools where the quality of the teaching and learning provision is evidently the first priority.*

To help you understand why schools should be learning organisations and through this, become *successful* in the provision of quality teaching and learning, it is useful to look briefly at the theories of *school effectiveness*, and then those of *school improvement*.

## School effectiveness

The concept of school effectiveness has to do with being able to identify the factors that contribute to, and are characteristic of, schools that are effective. In other words, it's about trying to understand what it is that makes a particular school enjoy high levels of learner success.

Understanding the factors that make an impact on effectiveness, will help school principals to identify areas of strength and areas requiring improvement and the next steps to take in their own school context.

### Activity 2: Understand what makes a school effective

**Suggested time:**

30 minutes

**Aim:**

To reflect upon and identify characteristics of effective schools.

#### What you will do:

1. List the characteristics that *you* think an effective school demonstrates.
2. Now WhatsApp or email this question to five colleagues – compare their lists with your own.
3. Do your responses agree? If there are differences why do you think this is?

4. You should now try to agree on a shared list of 10 characteristics.
5. Does *your* school demonstrate all or any of these characteristics?
6. If not, what might you need to do to help your school develop these characteristics?
7. Discuss this with a member of your school-based CoP.
8. Keep your response in your Learning Journal.

In this activity, you have played the role of teacher as researcher.

### Discussion of the activity

You have identified some characteristics of *effective* schools, and there may be many others that you have not identified. It may be that your shared responses with colleagues have identified very different characteristics, from which you might have made an agreed list. You can see that there is no one answer, or one definitive list of characteristics, as different schools will demonstrate different characteristics. But all *effective* schools will have some characteristics in common, whatever their context. You should now look at the following list which comes from school effectiveness research by Sammons, Hillman and Mortimore (1995 cited in Gultig and Butler 2002: 75). This research identified that *effective* or *good* schools are typically characterised by:

- Professional leadership;
- A shared vision and goals;
- A stimulating but ordered learning environment;
- A focus on teaching and learning;
- Purposeful teaching;
- High expectations of learners and staff;
- Positive reinforcement of learning attitudes and behaviours;
- Consistent monitoring of teaching and learning progress;
- Acknowledgement of learner rights and responsibilities;
- Positive home-school partnerships;
- The creation and maintenance of a learning organisation.

*School effectiveness research* equated *good* schools with schools in which learners consistently performed well academically. This was based on two assumptions, namely that (a) there was a link between the *organisational features* of *good* schools and their *good academic results*, and (b) once these characteristics had been isolated, then the academic performance of *not so good* schools could be improved by helping them develop those same features/characteristics.

Adding to this understanding, another body of research has focused on the concept of *school improvement*.

## School improvement

*School improvement research* has tended to emphasise *teaching and learning as the core business* of a school and, as such, researchers argue that it is the quality of these activities that should be researched in relation to the academic performance of learners. While drawing on the findings of school effectiveness research, school improvement researchers emphasise the impact on academic performance of teaching and learning processes and procedures, teacher skills, and teacher and learner attitudes.



### Activity 3: School effectiveness and school improvement in your school

**Suggested time:**

30 minutes

**Aim:**

The purpose of this activity is to help you think about the two bodies of research discussed above and how they might apply in your context.

**What you will do:**

1. Read the following two statements. Decide which you agree or disagree with, and why.

a. There is a body of opinion which says that it may be impractical for principals to follow either the school effectiveness (focussing on supportive systems) or school improvement (focusing on teaching and learning) approaches. There is doubt about whether the findings of the research can simply be transferred from one context to another, particularly given the widely divergent South African schools and contexts (Christie *et al.*, 2010). Recent research by Cliffe, Fuller and Moorosi (2018) in the United Kingdom also indicate that this assumption of transferability of characteristics between widely divergent [different] schools is highly problematic and is open to question. So what do you think? What is needed to effect improvement in teaching and learning in your school? Do systems need to change? Or should you focus on improving classroom practice? Or is something else needed?

b. Researchers have argued that the criteria for effectiveness should be linked to *context* (Ngcobo & Tikly, 2010; Msila, 2011). Fleisch and Christie (2004) state that:

*Systemic school improvement [i.e. a focus on school systems such as policy and procedures, culture, administrations, etc. as enablers of quality improvement] particularly for disadvantaged children, is inextricably linked to wider social, economic and political conditions – in South Africa’s case the political transition from apartheid to democratic government. These structural conditions and specific historical contexts are often glossed over in models of school effectiveness/improvement. (Fleisch & Christie, 2004: 95)*

They conclude that,

*The school effectiveness and improvement literature has developed over time, from an initial preoccupation with schools as units of effectiveness and change, to school departments and classrooms on the one hand and systems on the other. There is growing recognition that effectiveness can exist on a range of levels, just as change or improvement can be facilitated at many points. (Fleisch & Christie, 2004: 108)*

2. You should support or contest/challenge the views expressed using *reasoned argument* based on evidence from the wider readings recommended, and also based on evidence from your own experiences.
3. Discuss with a member or members of your school-based CoP. Keep your response in your Learning Journal as part of your PP.
4. To help you to further deepen your understanding of the issues related to school effectiveness discussed above, watch the following YouTube video with colleagues from your school-based CoP: *Instructional leadership for principals*: <https://www.youtube.com/watch?v=jCwP4PIEfQ8>. (Duration: 13.21). This video includes a description of the history, theory, progression and policy implications of instructional leadership. The Effective Schools Movement is discussed in detail in the video by Justin Osborn.
5. You then need to discuss and relate the ideas presented in this video to what you think might be needed in the context of your own school.

### Discussion of the activity

While different researchers may have focused on slightly different issues (as you will have seen from the two written extracts above and from watching the video) there is general agreement in the literature on the characteristics of successful schools and the central role that leadership and management have to play in creating and maintaining the conditions for success. It is also acknowledged that the effects of leadership and management are not direct and often hard to measure. In their report to the Minister of Education on the characteristics of schools that work, Christie *et al.* (2007: 5) observed that while most schools operated in challenging circumstances, four dynamics could be identified among schools that had successfully risen above these challenges:

1. All of the schools were *focused on their central tasks* of teaching, learning and management with a sense of responsibility, purpose and commitment.
2. All of the schools carried out their tasks with *competence and confidence*.
3. All had *organisational cultures or mind sets* that supported a work ethic, expected achievement, and acknowledged success.
4. All had strong *internal accountability systems* in place, which enabled them to meet the demands of external accountability, particularly in terms of Senior Certificate achievement.

It should be clear to you that there is a need for a school culture that reflects the kind of values and practices summarised above. The next section examines this issue in a little more detail.

## Identifying and understanding school culture

Integral to understanding the concept of a learning organisation and leading a learning school, is the notion of school culture. According to the Oxford Student Dictionary *culture* refers to “the customs, traditions, and civilisation of a particular society or group of people”. If this meaning is applied to the term *school culture*, it could, in other words, be a reference to the way in which things are done in a particular school and the value that the school community attaches to such processes and procedures (Prosser, 1997). It could also refer to the way in which the school is organised, the interaction between members of the school community, and stakeholder attitudes towards the school and the activities in which it engages. As noted in Figure 5, in *Module 3: Leading and managing extra- and co-curricular activities*, this includes ensuring that the learners’ voices are also heard and that distributed leadership extends also to these learners. (It might be useful to revisit the discussion on *distributed leadership* in *Module 1: Professional Portfolio and Workplace Project*.)

Similarly, Gultig and Butler (2002: 38) see *school culture* as the term used to describe “the way of life of the people within a particular school. It refers to the underlying beliefs and assumptions, norms and values, relationships and interactions, shared by people in a school” – that is “the way we do things around here”. This may result in both positive and negative situations, through action, or inaction. Morgan and Murgatroyd (1994: 65) suggest that culture is the sum total of the “implicit rules, assumptions and values” that bind an organisation together.

All schools are made up of groups of people – teachers, learners, as well as support and maintenance staff – typically gathered together for a common purpose, namely, to promote learning. If there is so much tension or disagreement between the members of the group that it is impossible for them to work together, or if they don’t work together in a planned way towards the achievement of a common goal/purpose, then they are simply a group of people who happen to be together and they are *not* an organisation. This is a significant factor in identifying a school culture and from that, whether a successful learning culture can be achieved. Moreover, in terms of understanding a successful learning culture and the means of achieving it, Morgan and Murgatroyd (1994: 65) claim that successful schools create and maintain a culture in which:

- Innovation is highly valued;
- Status is secondary to performance and contribution;
- Leadership is a function of action, not position;
- Rewards are shared through the work of teams;
- Development, learning, coaching and mentoring are seen as critical paths to sustainability;
- Empowerment to achieve challenging goals is supported by continued development;
- Success provides a climate for self-motivation.

They argue that in such a culture, the organisation and those working in it are energised by their successes, by their sense of ownership and by their commitment to the achievement of future successes. The importance of partnerships and networking in education provision to overcome the many contextual challenges faced by schools are then core characteristics both of learning schools and instructional leaders. The same can be said about the creation and maintenance of structures and processes to foster such collaboration.

### Activity 4: Your school and its culture

**Suggested time:**

1 hour

**Aim:**

To help you think about how your school culture can be identified and what this means for the teaching and learning that takes place.

**What you will do:**

Downey (cited in Hopkins and MacGilchrist 1998: 422) argues that “a school teaches in three ways: by *what* it teaches, by *how* it teaches, and by *the kind of place it is*.”

1. In thinking about how Downey’s claim might apply to your school, consider each of the statements about the three ways a school teaches and answer each as honestly and openly as you can:
  - a. **What** does your school teach? Does this apply to just the formal school curriculum or are there other things that are taught?
  - b. **How** does it teach? For example, think about who teaches. Are there shared or team-teaching opportunities? Are all teachers qualified to teach what they teach?
  - c. **What kind of place is your school?** It is important for you to describe honestly what it is like to work in this school. For example, is it collegial or do teachers all work in silos?[separately] Is management supportive? Also describe your school’s quintile, physical size, location, facilities, etc.

Thinking about these issues now will help you to identify areas for support and intervention in improving the quality of teaching and learning.

2. Now read and reflect on this quotation from a rural secondary school in Mpumalanga. In it, the principal describes the reaction to an attempt to improve the staffing and ensure a teacher for every Grade 9 class, even if the classes were larger as a result:

*We wanted to combine the Grade 9 learners, creating two classes from three classes to release teachers as our human resources are always a challenge. It wasn’t ideal but was the best solution we had. The learners were upset and, supported by some of the teachers, a riot broke out. They threw stones breaking windows and damaging my car. I tried to talk to them but the situation got worse, the SMT escorted me back to my office, standing guard ...*

- a. What would you say is the *culture* in this school?
- b. Who do you think “we” refers to in the quotation? Who do you think should be involved? Do you think that the members of staff work together to achieve a common purpose? If your answer was yes, what is

this purpose and what do they do together? If your answer to the last question was *no*, can you explain why this might be?

3. Look back at your response to Activity 4. What *common purpose* is being served well at your school? What are the implications, if any, for your school, whether you answered *yes* or *no*?

You might now usefully look at the YouTube video: *Teacher collaboration: spreading best practices school-wide*: <https://www.youtube.com/watch?v=85HUMHBXJf4> (Duration: 3.26). At Wildwood IB World Magnet School, in Chicago in the USA, teacher collaboration fosters a supportive professional culture, lessens teacher conflict, and provides learners with school-wide best practices.

### **Discussion of the activity**

If you accept that the rules, values and ways of doing things constitute culture, and if you accept that schools are organisations, you could refer to the culture of the school as its *organisational culture*, which underpins and informs the learning culture. This is the view of Morgan and Murgatroyd (1994: 25) who, referring to research in the area of school effectiveness, argue that organisational culture has a major influence on organisational performance (i.e. the learning process in schools). If the goals and the strategies required for achieving this reflect this culture, the organisation is more likely to be successful than it would be if they did not. According to them, that which distinguishes one organisation from another is often what makes it unique and, at the same time, is the characteristic that the organisation uses to market itself.

In the case of schools, their uniqueness would be reflected in those things that they value most, whether this is academic excellence, sport, culture, inclusive education practice, well-qualified teachers, a safe school environment, a combination of these factors or something else entirely.

### Activity 5: Observations on school culture

**Suggested time:**

45 minutes

**Aim:**

To deepen your understanding of the way a school culture can be observed and understood.

**What you will do:**

Write your response to the following questions – as a teacher and as a parent (if this is relevant). You might find it helpful to discuss this with your school CoP.

1. Can you identify any schools in any context that are associated with a particular kind of achievement and/or culture? For example, maybe you know a school in the Eastern Cape that has an outstanding choir or maybe a school in Mpumalanga that regularly participates in and wins awards at Science Fairs.
2. What is this achievement and what does it suggest about the unique culture of the school? Email or WhatsApp these two questions to six other teachers. Look at their replies and note what they have identified and why. Are there any common factors that you can determine from their responses?
3. Now think about what makes your school unique. Is this *uniqueness* of your school something positive or negative? What does it suggest about the organisational culture of your school? If your school is unique in the negative sense, what could be done to create a more positive culture?

**Discussion of the activity**

It is hoped that this activity has helped you to clarify the culture of your own school. It can also contribute to your Workplace Project and Professional Portfolio when you describe the context of your school.

In Section 1, you have spent some time exploring the notion of the school as a learning organisation and have identified several related issues – school effectiveness, school improvement and school culture. In Section 2 you will focus on your role as an *instructional leader* in developing a learning school.

## Section 2: Instructional leadership in the learning school

In this section, you will shift focus to a consideration of the relationship between academic performance and achievement, school culture and instructional leadership. Based on the concept that school culture affects learner performance, Section 2 argues that the quality of teaching and learning and, therefore, the standard of academic achievement, is *directly* related to the quality of instructional leadership. It also focuses on ways in which schools can maintain and improve with regard to all of these factors.

If you watched the video suggested in Activity 3, *Instructional leadership for principals*:

<https://www.youtube.com/watch?v=jCwP4PIEfQ8> (Duration: 13.21), you should now have more awareness of these factors and of your role in leading schools for quality teaching and learning. You should be able to define instructional leadership and consider how your role fits this. Before moving on, write your definition of instructional leadership in your Learning Journal.

Crucial to the creation and maintenance of a learning school is the role of instructional leaders, i.e. leaders who prioritise the quality of learning and teaching above everything else and who ensure that all school development plans also do so. The concept of instructional leadership is sometimes contested, and so there is no fixed description of what an instructional leader is. However, there is relative consensus amongst researchers (Bush, 2013a; Robinson, Hohepa & Lloyd, 2009) that instructional leaders are leaders who amongst other things:

- Focus on improving schools, and establish goals and expectations in this regard;
- Are classroom focused;
- Regularly reflect on their performance and encourage ongoing teacher learning and development;
- Emphasise teaching, learning and learner performance;
- Emphasise skills development and the conditions for their implementation such as strategic resourcing, maintenance of an orderly environment, networking, problem-based approaches and use of appropriate tools and technology.

However, Southworth (2002, 2004) prefers to use the term *learning-centred leadership* and he argues that the influence of the principal on teaching and learning takes three forms:

- *Direct effects* – where your actions directly influence school outcomes.
- *Indirect effects* – where you affect outcomes indirectly through other people.
- *Reciprocal effects* – where leaders affect teachers and teachers affect leaders.

Southworth therefore deepens your understanding of the instructional leadership role by pointing out that it is not only what leaders consciously choose to do that impacts on teaching and learning in the classroom. Teachers also influence one another's practices and can influence the leader's own thinking and practice.

### Activity 6: Concepts of instructional and learning-centred leadership

**Suggested time:**

45 minutes

**Aim:**

To deepen your understanding of the role of leadership in teaching and learning.

**What you will do:**

1. What are your views on these two different assertions from Bush (2013b); Robinson *et al.* (2009) and Southworth (2002, 2004)? Which would you support and why? Could you support both?
2. What are your views on the above **three forms** outlined by Southworth? From your experience, which of the three effects would you say is the most common? Give reasons why, and support your opinion with concrete examples from your own school and your leadership style within your sphere of influence.
3. Discuss this with a member of your school-based CoP.

**Discussion of the activity**

You may have decided that *indirect* effects include changes made by teachers in response to your role as leader in monitoring teaching and learning, and providing constructive feedback. You may also have decided that *direct* effects include your own practice as a HOD and teacher, and demonstrating (or modelling) good practice to your teachers. And certainly, *reciprocal* effects arise from dialogue – these are the conversations between leaders and teachers, whether formal or informal – the exchange of ideas leads to improved classroom practice. In schools that function well, the literature (Blasé & Blasé, 1998; Christie *et al.*, 2007; Hopkins, 2001) suggests that the following points are key in identifying what instructional leaders do and how they lead the school to success through establishing a positive learning culture:

- Instructional leaders do not pretend to know it all – they tap into other people’s expertise and allow others also to play leading roles in the school and in projects related to the school.
- Instructional leaders not only share information with others but support and encourage them in the use of all information and data management.
- Instructional leaders show an explicit orientation to the learning process and the creation of good relationships based on mutual respect.
- The personal values, vision, commitment and energy of instructional leaders motivate, energise and enable staff to participate in and even lead change and development projects.
- Instructional leaders often adopt the role of mentor to other staff members, supporting and guiding them in dealing with change and improving teaching and learning.
- Instructional leaders are lifelong learners – they read, study and do (action) research and encourage the rest of the staff to do the same, feeding new knowledge and understanding into school development projects.
- Instructional leaders encourage and model critical self-reflection and staff collaboration, including team planning, team teaching, peer observation and assessment as tools for staff development and the improvement of academic achievement.



On the basis of the previous discussion, this unit adopts the following definition of instructional leadership:

*Instructional leadership focuses on teaching and learning and on the behaviour of teachers in working with learners. Leaders seek to positively influence learning through their influence on other teachers but also recognise that leaders are themselves influenced by the teachers with whom they work. (Adapted from Bush & Glover, 2002: 10; Southworth, 2002, 2004)*

### Activity 7: Influencing classroom practice

**Suggested time:**

2 hours

**Aim:**

To enable a deeper understanding of differing ways instructional leaders can work in classrooms and apply these to your school context.

**What you will do:**

1. Carefully read the case studies in *Leading learning: instructional leadership in infant schools* (Foundation Phase in South Africa), Benson's 2002 classroom-based practitioner research. This can be accessed at <http://dera.ioe.ac.uk/5098/1/leading-learning.pdf>. You should highlight/underline any points that you think could be of value to improving teaching and learning development projects in your own school. Although these case studies are very interestingly set in Foundation Phase classrooms, the classroom initiatives of instructional leaders could be adapted for primary or secondary school. Keep this in mind for your context as you read through the case studies.
2. Now choose the case study that interested you most. Deconstruct [break up] the leadership development initiatives in the classrooms that are described. Put these into separate steps or activities, indicating the role that *the instructional leader* has to play in each.
3. Discuss the activities from point 2 above with one or more members of your school-based CoP and ask them to help you to identify and plan a similar process in your own school that could be developed.
4. Plan the project identified in number 3 together, identifying possible challenges/threats to its success and ways of overcoming or avoiding these. Remember to keep your response personal and related to your own situation as this might be used to help you identify and plan for developing your Workplace Project (WPP).

**Discussion of the activity**

Your work so far in this section should help you to realise that the principal cannot do everything alone. Each teacher has their own strengths as well as areas for improvement. Learning schools and effective instructional leaders are able to harness the power of team work and collaborative engagement to make the most of what everybody can contribute. The next sub-section discusses how this might be achieved.

## The value of collaborative structures and networks within schools

In considering the learning school and the role of the instructional leader, Hopkins and MacGilchrist (1998: 422) observe that much research suggests that school improvement for improved learning and teaching is best achieved through the use of *collaborative structures and networks*, both inside and outside the school. However, they argue that the key to *development planning* for learning and achievement remains within the school, with the most successful schools sharing the following characteristics:

- Developments are based on a shared vision.
- Leadership is strong and focused on academic improvement.
- The entire school community, including parents/guardians, is involved in school development.
- Development plans and procedures as well as management systems are in place.
- Staff development is a high priority.

Their research also suggests that teachers are most active around the learning they themselves organise: this is where they exert most influence and, by implication where they can affect change and reform positively. This is most likely to happen if the management style of the school leader encourages teachers to take ownership of the process. Such leaders are willing to share information, distribute tasks and/or responsibilities and encourage teachers, especially, to go on being creative and resourceful.

In schools that qualify as genuine learning organisations, the learning process is always kept up front. So, it follows that the collection and use of information on learning, and ways of enhancing learning, are the top priority in such schools and that whole-school planning and development depend on information gathered in classrooms. Also, the vision, goals, aims and objectives of learning schools are by definition learning-focused. As observed in *Module 1: Professional Portfolio and Workplace Project*, you should consider the value of collaborative sharing of the learning and teaching process within a learning school, perhaps through establishing, or expanding, communities of practice in your own school. You might find it useful to watch the YouTube video: *Key elements for effective teacher collaboration*: <https://www.youtube.com/watch?v=leB13CFt8a8> (Duration: 5.36). At the school in the YouTube video, Piedmont Intermediate School, teachers demonstrate the key components of effective teacher collaboration.

If you recognise that everybody in the school has something to offer towards continuous improvement of teaching and learning, and you wish to harness the potential of collaboration and networking, then you should also be open to decentralised or distributed leadership, as discussed below.

## Distributed leadership in the learning school

The modes of leadership in a learning organisation are key, as identified previously. Hopkins and MacGilchrist (1998: 422) identify two strong claims related to distributed leadership. This concept is introduced in more detail in *Module 4: Leading and managing people and change*. However for the purposes of considering how *leadership for learning* is best enacted in schools, you should look at this in relation to the learning school. Distributed leadership as a concept, has become increasingly important in leadership theory and practice, amid growing recognition that a centralised leadership model, involving the principal alone, does not produce maximum benefits for the school. There are various definitions of distributed leadership, but for the purposes of this unit, distributed leadership as defined by Harris is put forward:

*Distributed leadership concentrates on engaging expertise wherever it exists within the organisation rather than seeking this only within formal position or role. Distributed leadership is characterised as a form of collective leadership in which teachers develop expertise by working together. In short, distributed leadership equates with maximising the human capacity within the organisation. (Harris, 2004: 14)*

In this model, the principal is not the single leader, but is at the heart of a series of teams, and team leaders, working together with a shared purpose, to improve the school and enhance learner outcomes in accordance with the agreed vision and common values of the school. This module supports the view that team-work is at the heart of a distributed leadership approach. In Mbokazi's 2015 research it became clear that success could not be attributed to the principal working alone and that there needs to be a shared focus on "managing teaching and learning as the core purpose of schooling" (Mbokazi, 2015: 480).

You might like to think about your own experience of leading or being part of the leadership of school teams, and whether you would agree or disagree with Mbokazi and why. You know that the obvious leadership team in most South African schools is the SMT. This body comprises all teachers with leadership and management roles – the principal, deputy principal(s), heads of department (HODs), or heads of phase. The SMT, when working well, provides positive potential for generating and sustaining high-quality teaching and learning through the shared vision of quality improvement, and strategies to achieve this. But there are other team possibilities, and HODs and heads of phase can also organise their teachers into other highly effective teams, sharing their expertise on their common learning areas to improve teaching and maximise learner outcomes. There may also be *informal* teams designed to improve aspects of school life, for example, school sports activities, extended academic activities, and choir and music activities, outside of the mainstream curriculum provision. This aspect will be considered in *Module 3: Leading and managing extra- and co-curricular activities*.

Leadership teams may also exist beyond the professional staff of the school. For example, the most effective SGBs also operate as teams, with community members and professional stakeholders working together to improve the school. However, research has shown that many *teams* in South African schools do not operate effectively. For example, research by Bush *et al.* (2008) on the management of teaching and learning in eight schools in Limpopo and Mpumalanga, shows that many teams were dysfunctional. They report that their respondents were often unable to make a clear distinction between the work of individual HODs and the collective work of the SMT in instructional leadership. Five of the eight SMTs had little impact on teaching and learning either because they rarely met or because they didn't engage with teaching and learning issues. At two schools, the SMTs did have a formal role in managing teaching and learning while the principal at another school was planning a stronger role for the SMT from 2009.

Bush *et al.* (2008) conclude that, where SMTs operate successfully, they have great potential to improve classroom practice through HODs sharing their ideas, developing school-wide policies and enacting consistent practices throughout the school. This was also observed in Faulkner's (2015) research of female principalship in secondary schools in areas of multiple deprivation. She observed that the principals' attempts to engage the SMT in distributing leadership for quality improvement were undermined and even sabotaged, rather than supported. Of course there were other factors in this resistance, specifically the gender bias and patriarchal attitudes displayed by some staff to a female principal. This is another area of leadership and gender which will be explored in *Module 4: Leading and managing people and change*. But the key point is that collaborative and shared leadership is critical for schools to improve the quality of teaching and learning.

Therefore, as this research makes clear, whatever the circumstances, one of the principal's central roles is to build the SMT into an effective force for school improvement. Bush *et al.* (2008) concluded that this could be achieved by the principal doing this through one or more of the strategies identified below:

- Using the team approach.
- Developing individual responsibility for collective gains.
- Rewarding people for successes.
- Building on successes and learning from failures.
- Examining and using a variety of models for self-development and team work to improve teaching and learning through:
  - Peer coaching;
  - Critical friends;
  - New teacher/experienced teacher partnerships;
  - Action research teams or study groups.

In a similar way, Pont, Nusche and Moorman (2008) and Kelley (2010) indicate the need for the following actions:

- Define a shared vision and goals (the focus in Unit 1).
- Build the capacity of leaders and leadership teams and general teacher quality (the focus in Unit 2).
- Mobilise distributed leadership, including collaboration with external partners, to analyse problems and plan solution strategies using best available data (the focus in Unit 3).
- Align leadership structures, resource allocations and roles to support improvement plans (what you will need to take forward on completion of this module and programme).

These strategies are supported in Mbokazi's (2015) research. He demonstrates that where a strong principal encourages and supports the SMT in the search for improved quality of teaching and learning, then positive results were observed in quality provision, and learner motivation and outcomes (Mbokazi, 2015: 475). Similarly, research by Chikoko *et al.* in successful secondary schools in areas of multiple deprivation showed that collaboration and trust within distributed leadership was a key factor in that success (Chikoko *et al.*, 2015: 460). They said that:

*All the five principals reported a strong sense of shared ownership of decisions in their schools. In this regard Mr Khangela said: "I believe in the principle of working together ... I don't do it alone. My SMT members and I work as a team."* (Chikoko *et al.*, 2015: 460)

### Activity 8: Claims for school leadership: read, reflect and write

**Suggested time:**

2 hours

**Aim:**

To deepen understanding of instructional leadership and develop critical reading skills.

**What you will do:**

1. Read the following article noting the arguments and evidence used to support the *seven strong claims* for school leadership discussed in the paper:  
Leithwood, K., Day, C., Sammons, P., Harris, A., Hopkins, D. 2006. [Seven strong claims about successful school leadership](http://www.ncsl.org.uk/media/767/B2/seven-claims-to-success.pdf) Available: <http://www.ncsl.org.uk/media/767/B2/seven-claims-to-success.pdf> [2018, August 14]
2. In a well-structured, written response, give your views on the arguments put forward in the article, supporting or contesting them.

Write three or four paragraphs, each with clear topic sentences. Each paragraph should be approximately 10–12 typewritten lines in length. This should be a reasoned argument (as you learned in *Module 1: Professional Portfolio and Workplace Project*) that must be supported by evidence from sources/readings, as well as your own experiences. You should provide a short concluding paragraph which summarises the key points you have made in your response.

Remember the difference between how you reference if you paraphrase from the author's work, and if you quote directly. Your higher education institution (HEI) will also assist you with this as they may have different ways in which they want you to present and reference.

It is a good idea to first *pre-write*, where you just put your ideas down. When you *pre-write* you can make mindmaps, free write, make bullet point lists – any format that helps you get your ideas down. Following this, write a first draft and perhaps a second draft as you slowly organise your thoughts more logically and structure your writing more coherently. When you write your final copy, make sure you edit this carefully and then ask a colleague, friend or family member to read this through before you complete the final draft.

Remember that you must always give reasons for your responses that are based on your experience, your context, and supported by the literature you have read – this is what is called a reasoned argument.

3. File your written response in your PP.

**Discussion of the activity**

The article you have just read for this activity summarises the international evidence on successful school leadership. It is helpful to recognise that these leadership strategies are within the grasp of all school principals and aspiring principals, in advantaged and disadvantaged schools. Realistically, however, this is

only if context and the ability to work with what you have is analysed, evaluated and acted upon. Remember the authors' distinctive comment that "there is not a single documented case of a school turning around its pupil achievement trajectory in the absence of talented leadership" (Leithwood *et al.*, 2006: 5). South Africa has many examples of this (Christie, 2010). These are inspirational case studies which demonstrate that your learners and teachers can be motivated to build upon and improve the quality of teaching and learning at your school, even from a very disadvantaged base. You might also like to read Harris's research *Distributed school leadership: developing tomorrow's leaders* (Harris, 2013) which is detailed in the reference section.

### Activity 9: Promoting distributed leadership in schools

**Suggested time:**

1 hour

**Aim:**

To deepen your understanding of distributed leadership and how it applies in your context.

**What you will do:**

In completing the following tasks, analyse your own context and write from your experience.

1. How can you promote and develop distributed leadership in your school? If distributed leadership is already well established in your school, how did it come to be so?
2. Use bullet point format to show the key areas; and then a paragraph (10–12 typewritten lines in length) to explain why you think these are key in your context.
3. What enablers and/or barriers do you envisage in encouraging this approach to leadership? List these in two columns – one column for enablers and one for barriers. Discuss your responses with a member of your school-based CoP.
4. Now read the discussions below (Exploring the development of distributed leadership across the school; Teacher leadership) and think about whether your response agrees or disagrees with the arguments presented. How have your experiences as a leader, in whatever your sphere of influence, shaped your views on distributed leadership?

**Discussion of the activity**

Remember that there is no one answer or right answer. The context will sometimes determine what you can or cannot achieve. Keep your response in your Learning Journal.

## Exploring the development of distributed leadership across the school

In the past, leadership was top-down in nature. However, with the democratisation of education, post 1994, the move was towards "participative, *democratic* management, collegiality, collaboration, schools as open systems and learning organisations, and importantly, site-based management" (van der Mescht, 2008 cited in Grant *et al.*, 2010: 401). Teacher leadership is described as an approach where all teachers can lead at

various levels of the organisation. Leadership is therefore not positioned in a single person, such as the principal only, and should be approached as involving groups where anyone can lead. This is an important argument that Harris (2013) makes in the research referenced earlier.

You cannot discuss teacher leadership without considering how distributed leadership can be utilised to ensure that groups work together, each member bringing their own expertise to the situation. This, according to Grant *et al.* (2010: 403) means that power has to be redistributed so that the leader can relinquish sole power and thereby release the potential power of other teachers (Barth, 1988 cited in Grant *et al.*, 2010: 403).

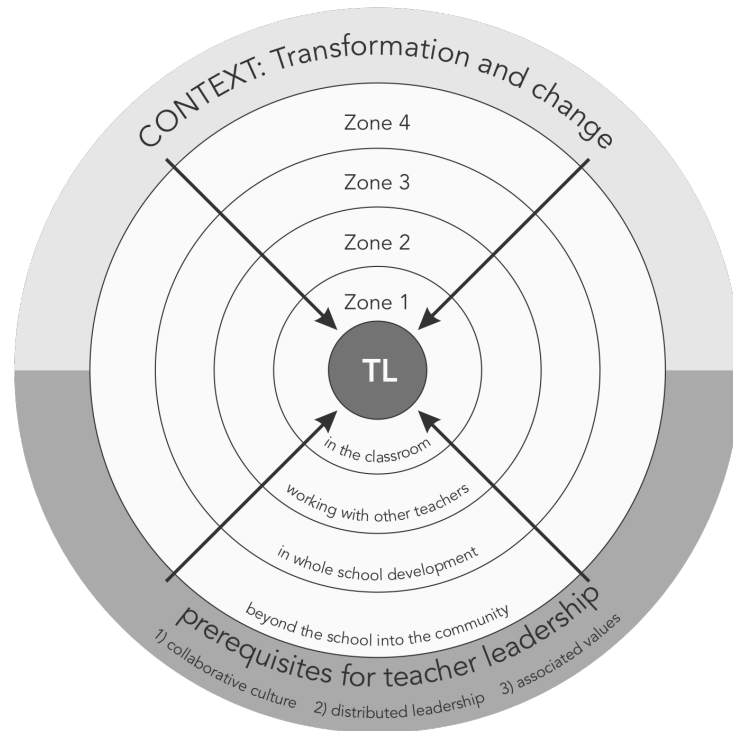
## Teacher leadership

The model provided in Figure 2 below was developed in three phrases during research conducted over a period of five years (Grant, 2017: 7). This research was intended to gauge teachers' understanding of teacher leadership. The model represents:

- i) areas or zones depicting areas in which teachers might currently be practising teacher leadership in their contexts or where they see themselves leading in future;
- ii) the roles that teachers can adopt in each of these zones;
- iii) the analysis of indicators of such leadership in each of the zones are provided.

Carefully consider this diagram and identify how these roles and zones may apply to schools generally, and to your school context in particular.

Grant (2008) envisages a teacher working in expanded zones of influence from within the classroom to the whole school and then to working with other schools. They must also be both able and willing to move from critical reflection on, and improvement of their own practice, to leading in-service development opportunities for other teachers (a process you will follow in Units 2 and 3). This expanded set of zones of influence and roles to be played is consistent with everything discussed so far regarding learning schools and instructional leadership. Continuing professional development for teachers is a critical aspect of managing teaching and learning effectively.



**Figure 2: Model of teacher leadership**

(Source: Grant, 2008: 93)



**FIRST LEVEL OF ANALYSIS - FOUR ZONES**

Zone 1 In the classroom	Zone 2 Working with other teachers and learners outside the classroom in curricular and extracurricular activities	Zone 3 Outside the classroom in whole school development	Zone 4 Between neighbouring schools in the community
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**SECOND LEVEL OF ANALYSIS - SIX ROLES**

One: Continuing to teach and improve one's own teaching	Two: Providing curriculum development knowledge	Three: Leading in-service education and assisting other teachers	Four: Participating in performance evaluation of teachers	Five: Organising and leading peer reviews of school practice	Six: participating in school level decision-making	Two: Providing curriculum development knowledge	Three: Leading in-service education and assisting other teachers
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**THIRD LEVEL OF ANALYSIS - INDICATORS**

<p>1. centrality of expert practice (appropriate teaching and assessment strategies &amp; expert knowledge)</p> <p>2. keep abreast of new developments (attendance at workshops/further study) for own professional development</p> <p>3. design of learning activities &amp; improvisation/appropriate use of resources</p> <p>4. processes of record keeping &amp; reflective practice</p> <p>5. engagement in classroom action research</p> <p>6. maintain effective classroom discipline and meaningful relationship with learners (evidence of pastoral care role)</p> <p>7. take initiative &amp; engage in autonomous decision-making to make change happen in classroom to benefit of learners.</p>	<p>1. joint curriculum development (core &amp; extra/co-curricular)</p> <p>2. team teaching</p> <p>3. take initiative in subject committee meetings</p> <p>4. work to contextualise curriculum for own particular school</p> <p>5. attend DoE workshops and take new learning, with critique, back to school staff</p> <p>6. extra/co-curricular coordination (e.g. sports, cultural activities etc.)</p>	<p>1. forge close relationships and build rapport with individual teachers through learning takes</p> <p>2. staff development initiatives</p> <p>3. peer coaching</p> <p>4. mentoring role of teacher leaders (including induction)</p> <p>5. building skills and confidence in others</p> <p>6. work with integrity, trust and transparency.</p>	<p>1. engage in IQMS activities such as peer assessment (involvement in development support groups)</p> <p>2. informal peer assessment activities</p> <p>3. moderation of assessment tasks</p> <p>4. reflections on core and co/extra-curricular activities</p>	<p>1. organisational diagnosis (Audit – SWOT) and dealing with the change process (School Planning)</p> <p>2. whole school evaluation processes</p> <p>3. school based action research</p> <p>4. mediating role (informal mediation as well as union representation) including</p> <p>5. school practices fundraising, policy development, staff development, professional development initiatives etc.).</p>	<p>1. awareness of and non-partisan to school (work with integrity, trust and transparency)</p> <p>2. participative leadership where all teachers feel part of the change or development and have a sense of ownership</p> <p>3. problem identification and resolution</p> <p>4. conflict resolution and communication skills</p> <p>5. school-based planning and decision-making.</p>	<p>1. joint curriculum development (core and extra/co-curricular)</p> <p>2. liaise with and empower parents about curriculum issues (parent meetings, visits, communication – written or verbal)</p> <p>3. liaise with and empower the SGB about curriculum issues (SGB meetings, workshops, training – influencing of agendas)</p> <p>4. networking at circuit/district/regional/provincial level through committee or cluster meeting involvement.</p>	<p>1. forge close relationships and build rapport with individual teachers through learning takes</p> <p>2. staff development initiatives</p> <p>3. peer coaching</p> <p>4. mentoring role of teacher leaders (including induction)</p> <p>5. building skills and confidence in others</p> <p>6. work with integrity, trust and transparency.</p>
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Figure 2: Model of teacher leadership (Source: Grant, 2008: 93)

You can see that the principal and the SMT need to optimise teacher leadership beyond the classroom to ensure that distributed leadership becomes a key factor in the provision of quality teaching and learning in the school, both within and outside the classroom. According to Harris and Lambert (2003 cited in Grant *et al.*, 2010: 402) teacher leadership is “a focus on improving learning and is a model of leadership premised on the principles of professional collaboration, development and growth”.

With distributed leadership the individual can contribute by adding their expertise to the group, power is redistributed and the latent power of the teacher is released (Grant *et al.*, 2010: 403). It is evident that the building of teacher leadership will involve delegating responsibility and ensuring that accountability measures are built in to ensure delivery of what is expected.

Grant (2017) argues that if educational change is to happen, it is important that teacher leadership be found in more mainstream schools than is the case at present. It is evident that the school culture is the biggest influence on whether there is teacher leadership development that could contribute to school improvement.

### Activity 10: Research teacher leadership in your context

**Suggested time:**

1 hour

**Aim:**

To investigate the presence and nature of teacher leadership in your context.

**What you will do:**

Read and reflect on this research article by Grant, C., Gardner, K., Kajee, F., Moodley, R. and Somaroo, S. 2010. Teacher leadership: a survey analysis of KwaZulu-Natal teachers' perceptions. *South African Journal of Education*, 30: 401–419. A PDF of this article can be downloaded freely at: <https://www.ajol.info/index.php/saje/article/view/60035/48293>

1. Conduct the same kind of investigation as described in the article within your own sphere of influence. You might need to re-word some of the questions but the closer your questions are to the original, the easier it will be to make comparisons.
2. Select a committee that exists in your school and try to determine whether any leadership role is taken by a post-level 1 teacher.
3. Try to determine whether there is a culture of collaboration in this committee.
4. What can you say about this *teacher leader*? Does it seem that they are *emerging* as a teacher leader or being *developed* as a teacher leader? What are the factors that might be preventing them and other teachers becoming teacher leaders in your school?
5. Discuss your findings with a member of your school-based CoP. Make a note of your response in your Learning Journal.

### Discussion of the activity

The focus of your investigation should be on post-level 1 teachers who are positioned strategically to take on certain teacher leadership roles. You might have been able to identify such a teacher or teachers, and where they are applying their leadership roles within the school. This is often more easily seen where teachers take on leadership roles in extra-curricular and co-curricular activities, which you will explore in more detail in *Module 3: Leading and managing extra- and co-curricular activities*.

Now, consider the leadership culture in your context. Are teachers open to engaging with leadership at post-level 1 or is there a culture of expecting members of the SMT to carry the weight of leadership and management? Grant *et al.* (2010) argue that:

*Teacher leaders are agents of change and this agency should be nurtured and tapped so that teachers learn to lead new initiatives and challenge the existing status quo in schools in the pursuit of excellence in teaching and learning. To do this, teachers require support from the principal as 'leader of leaders' and through continuing professional development initiatives, both inside and outside the school. (Grant et al., 2010: 404)*

Teacher leadership should be built in to the culture of the organisation and not seen as individual endeavours only (Grant, 2017). Where teacher leadership is practised, it is not centred in a singular position, but approached as a *group-process*, where all can contribute. The following are qualities found in teachers who lead:

- Expertise (in subject and own teaching);
- Confidence as expertise develops to lead others in search of excellence;
- Mentoring skills;
- Reflective practice;
- Coaching;
- Action research knowledge and skills.

Do you consider that the culture of your school encourages teachers to lead and contribute to the leadership of the school? Stop for a moment to think about this. Grant *et al.* (2010) maintain that there is no doubt that involvement in teacher leadership will, for the individual, lead to greater job satisfaction, productivity and commitment to the context.

Howey (1988 cited in Grant, 2010: 35) emphasises that teacher leadership is “ultimately proven in the efforts of others to attempt to scale heights of human achievement and plunge depths of human caring not otherwise envisioned.” When teachers subscribe to this, and are actively encouraged and supported by the principal and SMT, then they can meaningfully contribute to transform their schools in a positive and effective way as the change agents research argues that they should be, whatever the context.

As discussed throughout this unit, you know that no two school contexts are the same: each will find itself within a particular “historical, cultural and institutional setting” (Grant *et al.*, 2010: 404). Teacher leadership can contribute to creating more democratic societies within school contexts and thus bring about the changes and transformation that were envisaged for the South African educational context post 1994. This is relevant to both the core curriculum, and co-curricular and extra-curricular activities. The discussion in this unit has highlighted some of the problems mentioned earlier regarding the success of distributed leadership, either because of principals’ unwillingness to share or devolve power, or of the SMT’s unwillingness to

participate or endorse this distribution through shared action and teamwork (Bush *et al.*, 2008). Teacher leadership recognises that individual teachers, and teacher teams, are able to exercise leadership independently of the formal management roles exercised by principals, deputy principals and HODs. Therefore, teacher leadership may be regarded as consisting of “teachers who lead within and beyond the classroom, identify with and contribute to a community of teacher learners and leaders, and influence others towards improved educational practice” (Katzenmeyer & Moller, 2001: 17).

Harris and Muijs (2003) point to the need to broker and mediate relationships between colleagues for some surrender of power by senior leaders, who should have a belief in a collaborative philosophy, and for a transformation of schools into CoPs. This requires a substantial change of focus for many South African principals (Bush, 2013b) but it is a focus that is entirely consistent with the principles of *ubuntu* as well as traditional African leadership practices in which the leader both consults and delegates (Letseka, 2016).

Different forms of teacher leadership have different positive activities and outcomes. However, the principal needs to consider whether some, or all, of the following enablers already exist or could be put in place, namely:

- A culture that is, or would be, supportive of distributed and teacher leadership.
- A clear commitment to this approach from the principal, the SMT and the SGB.
- Strong support for teacher professional development.
- A collective commitment to school improvement.
- High levels of teacher participation and involvement.
- Shared professional practices and recognition and reward for participants.

As Robinson has argued:

*The more leaders focus their professional relationships, their work and their learning on the core business of teaching and learning, the greater their influence on student outcomes. ... leadership theory, research and practice needs to be more closely linked to research on effective teaching so that there is greater focus on what leaders need to know and do to support teachers in using pedagogical practices that raise achievement and reduce disparity.* (Robinson, 2007: 12)

It follows that if you wish to involve all your teachers in collaborative and networked distributed leadership, you then need to support them to develop any additional competences that they might need to be able to do this effectively. Hence, a commitment to distributed teacher leadership requires you to identify and address any professional development needs that might arise or be anticipated.

## Motivating and supporting teachers

This section focuses on the leader’s role in professional development. School principals have the overall responsibility for creating the conditions that support effective teaching and learning, working with their SMTs and their teachers. Each school offers a unique challenge, and opportunity, in developing and enhancing learner outcomes. In facilitating quality improvement, the need for staff development initiatives is critical to enable this process of Continuous Professional Teacher Development (CPTD) to be entrenched in the school culture. The importance of CoPs is a key factor in providing support, as mentioned earlier, but how this can be achieved remains problematic for many principals in schools where the context and prevailing

culture works against such provision.

It seems clear that collaboration and commitment of all staff, based on shared values, is the key to successful implementation. It can be done through the creation of a staff development team and the effective dissemination of good practice, including observation of, and with, other teachers in classrooms and other learning areas. As the SASP document states (DBE, 2015: 11), there are key requirements for instructional leadership, and responsibility for implementing and monitoring professional development initiatives for quality improvement in teaching and learning must be a priority resting ultimately with the principal, who must recognise that professional support and professional development are key elements of the learning school and its teachers, in any context or phase. This will enhance the learning opportunities of the learners and the teachers, maximising potential and opportunities.

### Activity 11: Formative assessment of instructional leadership

**Suggested time:**

30 minutes

**Aim:**

To provide an opportunity to connect ideas and examples to your own context and practice.

**What you will do:**

You should read the following case study, based on an actual school situation and then answer the questions below.

Ms Mahlangu has been the principal of Tirisano Secondary School for three years. She was satisfied that the school had set up the necessary teams to handle issues of governance, policy, finances, physical resources, staff development, communication and school development, as was required by National and Provincial legislation and policy. Since her appointment she had ensured that there were various teams involved in curriculum planning and monitoring, the management of assessment, and the support of learners with particular learning needs. She also made sure that a staff member from the school attended all the training and development workshops and discussion forums that were communicated via the circuit office. Those teachers who attended the meetings were supposed to report back on what they had learned at the next staff meeting, and also write a report to the SMT; but this was rarely implemented, and time to follow this up was limited by other pressing concerns.

As the principal, Ms Mahlangu was concerned that lip service only was paid to these matters. And this was made worse as despite the fact that the staff were allocated to designated teams, the teams met irregularly and no minutes of their meetings were available, neither were any action points shared or followed up formally. Ms Mahlangu felt that in many ways these staff

members were simply *going through the motions*. The group discussions following training were superficial and not too frequent with people finding little time or energy to action any suggestions. Reflection on classroom practice was still very limited and she was unable to see how critical reflection changed the practical situations; change based on reflection remained a rare occurrence. Although her staff seemed willing to cooperate when asked, they didn't really engage with the pressing issues of the school, suggest new things, or implement change. In fact, they seemed uninspired and *tired*. They functioned in what she thought of as *survival mode* rather than as the impassioned innovators that she had hoped to nurture. She knew that the school needed to rediscover a sense of purpose and a passion for teaching and learning. What was she to do?

Now answer the questions, making notes for your Professional Portfolio.

1. How does this case description compare with the situation in your school? Note differences and/or similarities.
2. What advice can you, as a fellow school leader, offer to help the principal in the case study turn her school around into a successful learning school?

Be specific and also explain *what* might be done, *how* this can be done and *why* this should be done.

In responding to this case study remember that there are no right answers to the question but you should think about Ms Mahlangu's particular situation in order to help you to engage with issues of innovation and self-evaluation at your own school. Many schools are like Tirisano Secondary School – the staff simply go-through-the-motions and they drift from day to day, conforming, rather than transforming. Fundamental to addressing the kind of staff attitude experienced by Ms Mahlangu and Tirisano Secondary School is the need to proceed from an understanding of the situation in which staff find themselves. If you understand their lack of enthusiasm, perhaps you can engage with them in a more appropriate and sensitive way. Your suggestions could include the following:

- How many sessions for reflection will make it *regular* enough?
- What are the staff focused on: their classrooms, extra-curricular activities, stressful events, discipline? Why is this the case?
- What are staff valued for, and/or required to improve or change?
- How are staff members held accountable for the performance of their learners?
- How is the staff supported in their own development?
- Given your context, how do you expect the staff will react to new developments, e.g. as a hindrance, or as a welcome innovative solution? Give your reasons for the response.

### Discussion of the activity

Remember there is no one answer or right answer or approach to the questions above. But you could argue that in any school context the Department of Education, teacher unions, parents/guardians, learners and other stake-holders need to work together in the interests of effective learning and teaching. The principal

must be able to communicate with the school community. All these parties should model, mentor, organise and coordinate as necessary in meetings with these stakeholders. The following strategies, based on research in South African schools and internationally (Chikoko *et al.*, 2018; Hopkins, 2001; Witten, 2017), are key to successful distributed leadership, and thus instructional leadership:

- Challenging the process;
- Inspiring a shared vision;
- Enabling others to act;
- Modelling the way;
- Encouraging passion and enthusiasm for purposeful change.

However, the ability to affect these kinds of processes will be helped or hindered by the existing, and often entrenched, culture of the school. So, how ready are your school stakeholders to embrace the kind of transformational change envisaged by policy? Does the culture of your department and school support transformation? These are questions you need to think about very carefully. This will help you in determining what you will try to improve in the teaching and learning in your school. Remember to use this for your Workplace Project.

## Conclusion

In this unit you explored the concept of the school as a learning organisation, with a learning culture that encompasses both learners and staff. It is through reflection on your own experiences of instructional and distributed leadership, in the many different contexts that exist in the South African schooling system, that you can acknowledge the complexity of the task and the many variables that present as enablers and/or obstacles. The leadership focus was on the application of knowledge and understanding of instructional leadership. You then considered the ways in which the leadership and management of these processes at all levels can ensure successful teaching and learning across the school and thus improve learners' achievements.

More specifically, this unit presented you with practical examples of instructional leadership initiatives at schools and the organisational management processes required to make sure that what is supposed to happen does happen: most importantly in leading and managing teaching and learning in the most appropriate and effective way for your school and context.

## Key points

- Schools can be defined as organisations that focus on learning, but they require specific leadership and management strategies to become learning organisations.
- To achieve this means developing a learning culture, which may be problematic if the school's existing culture is not supportive of this: i.e. it is stuck in the thinking of *that's the way we do things around here*.
- Instructional leadership is then needed to help bring about change.
- The concept of distributed leadership and how instructional leadership should become a collaborative and shared activity to include teacher leadership development and opportunities from post level 1.
- The need for continuous conversation, reflection and the asking of critical questions about core teaching and learning issues.

## Activity 12: Self-and peer-assessment

**Suggested time:**

30 minutes

**Aim:**

To consolidate learning in Unit 1 and to address any outstanding questions.

**What you will do:**

You have now reached the end of Unit 1 which explored the question of **why** managing teaching and learning requires a special focus and the role of instructional leaders in developing the school as an organisation in which people continuously learn, innovate and improve.

1. During the course of the discussions in Unit 1, you have written up your own thoughts on the various issues discussed. It is time now to consolidate these ideas into a coherently worded statement which addresses the following two key questions:
  - a. Why is it important to focus on the management of teaching and learning?
  - b. What can I do as an instructional leader to contribute to building a learning school?
2. Based on your learning in this unit, also formulate one to three questions for further inquiry.
3. If you have access to an institutional learning management system, post your consolidated statement in the relevant discussion forum or blog space. Then provide critical feedback on the post of at least one other participant by:
  - a. Identifying something you agree with and explaining why.
  - b. Identifying something you disagree with or have reservations about and explaining why.
  - c. Providing some preliminary ideas in response to the question(s) identified for further inquiry.
4. If you have the opportunity to meet with other participants during a contact session, encourage your facilitator to create space for an open-ended discussion on the issues explored in this unit. Two possible ways to do this include:
  - a. Invite three or four participants to form part of a panel. Each panellist will present their views, respond to critical questions from the chair and then respond to questions and suggestions from the plenary.
  - b. Form groups of more or less seven participants to role-play an SMT meeting. Elect one participant to chair the meeting as principal and another participant to keep notes to report back. The meeting should discuss the two questions addressed above with a focus on what the SMT can and should do collectively. Each SMT should then provide feedback to the plenary.



## SECTION 2: INSTRUCTIONAL LEADERSHIP IN THE LEARNING SCHOOL

The broad issues discussed in Unit 1 provide a framework from which to engage with the specific challenges of planning, implementing and monitoring the school curriculum which you will explore in Unit 2.



# Unit 2: Planning, implementing and monitoring a curriculum

## Introduction

In Unit 1 you explored **why** managing teaching and learning is central to developing schools that work, and focused on the notion of a learning school guided by instructional leaders. In Unit 2 you shift your focus to **what** must be managed with respect to the school curriculum as outlined in the current Curriculum and Assessment Policy Statements (CAPS).

This unit has been arranged into three sections, to help you understand these key issues:

**Section 1:** Understanding the curriculum.

**Section 2:** Curriculum planning and implementation.

**Section 3:** Curriculum monitoring and evaluation.

### Unit 2 learning outcomes

By the end of this unit you should be able to:

1. Demonstrate the personal qualities, attributes, pedagogic knowledge and professional competencies necessary for effective leadership and management of teaching and learning.
2. Reflect upon and demonstrate an understanding of what constitutes an instructional leader and the importance of this role.
3. Lead and manage the planning, implementation, monitoring and evaluation of teaching to ensure quality learning for all in the context of national, provincial and school policy.
4. Demonstrate and be able to apply relevant content knowledge in the design, implementation and evaluation of teaching and learning and the organisation of the school environment.
5. Demonstrate an understanding of the relationship between managing teaching and learning, financial principles, the links to resource management and school development planning.
6. Demonstrate an understanding of the link between resource inputs and educational outcomes in own school context.
7. Understand and demonstrate the integration of curriculum and staffing needs, and decisions with the budgeting process.

## UNIT 2: PLANNING, IMPLEMENTING AND MONITORING A CURRICULUM

This unit will build upon what you have learned and engaged with in Unit 1. The focus now is how you as an instructional leader, in collaboration with the school management team (SMT) and teachers, understand and enact curriculum design, implementation and evaluation.

Your starting point is therefore the curriculum. From there you will explore issues related to content, to teaching and to engaged learning. In each sub-theme you will critique and improve your own practice in order to better understand what support other teachers will need from you as an instructional leader.

## Section 1: Understanding teaching and learning in relation to the curriculum

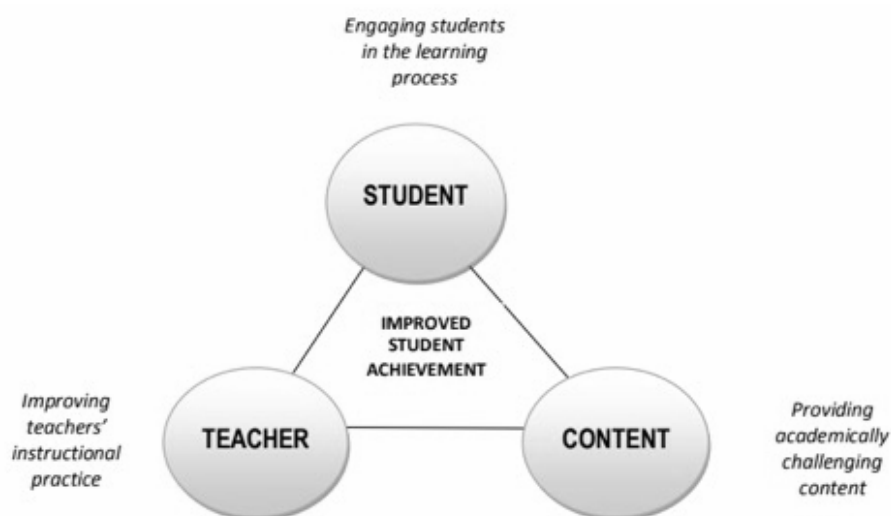
Curriculum is the heart of the education system. This is not only in terms of what is taught but also in terms of how this is done through the teaching and learning process. This includes the extent to which what is *learnt* matches what is *taught*, and how this can be measured and monitored. Therefore, the unit deals not only with curriculum knowledge and understanding but also with the skills and practices required to lead and manage the design, implementation and monitoring of curricula in your schools.

Systemic change in educational provision and outcomes, *without curriculum change* is unlikely to result in changed people, only in changed school structures and procedures. The South African curriculum has changed twice during the two decades of democracy. First it was changed from a subject-oriented curriculum to a learner-centred, outcomes-based one (Curriculum 2005) that focused on the achievement of competences rather than knowledge. This curriculum was reviewed as a result of systemic and pedagogical concerns, (read if you can, L. Chisholm, 2000. *A South African curriculum for the twenty first century*) and was modified in 2005. This modification saw the introduction of the National Curriculum Statement (NCS) for the General Education and Training Band and one for the Further Education and Training Band. Subsequently the NCS became integrated into a single policy document, *The National Curriculum, Assessment and Policy Statement (CAPS)* that includes the content specified for each subject. This replaced the Subject and Learning Areas Statements, Learning Programme Guidelines and Subject Assessment Guidelines for all the subjects listed in the NCS for Grades R–12.

Underpinning the current CAPS are the key factors of the promotion of inclusive education and the infusion of values and human rights issues in all learning areas. All learners, irrespective of race, colour, (dis)ability or social class are exposed to this curriculum and are expected to succeed.

Leading schools in this new era is a complex task. Principals and other school leaders are required to create, manage and maintain learning environments that are conducive to teaching and learning for all teachers and learners in all contexts. As you will learn in other modules, many legislative and policy changes have affected schools. These include: the banning of corporal punishment and the need to find alternative disciplinary measures; new admissions policies ensuring that no learner can be refused admission on the grounds of race, colour, socio-economic status or language; and parents/carers and learners forming part of school governance structures through school governing bodies (SGBs) and learner representative councils (LRCs). In this way education is regarded as a vehicle for social change, and is integral to the transformation and redress legislation, policies and ideals of post-apartheid South Africa.

This is a lot to think about. Since you cannot possibly cover everything that might be useful, this unit focuses on the notion of *the instructional core* as explained by City *et al.* (2010) and as illustrated in the following diagram.



**Figure 3: The instructional core**

(Source: City *et al.*, 2010)

The instructional core comprises three interdependent components: teachers' knowledge and skills; learners' engagement in their own learning; and access to appropriate, academically challenging content. Because the three components are interdependent, a change in any one component requires a change in the other components. For example, if you would like teachers to make use of technology to engage their learners more actively in the learning process, you will then need to support the development of their instructional practices as well as their ability to find and possibly adapt appropriate content.

However, you do not want teachers simply to do whatever seems interesting to do: a school has an obligation to address the requirements of the school curriculum.

This section focuses on the leadership and management of teaching and learning, through curriculum delivery. You will first revisit your understanding of teaching and learning and then explore how teaching and learning decisions are informed by and influence curriculum decisions.

### Activity 13: What is meant by teaching and learning?

**Suggested time:**

30 minutes

**Aim:**

To deepen your understanding of the concepts of teaching and learning.

**What you will do:**

1. What does it mean *to teach*? What does it mean *to learn*? How do *you* define *teaching* and *learning*? Write down your responses and discuss them with a member of your school-based Community of Practice (CoP) to compare your responses. You might also email, SMS or WhatsApp the question to six teachers you know, and then compare their answers with yours.
2. Keep your response in your Learning Journal.

### Discussion of the activity

Did your responses differ? Were there different views of teaching and learning that came from this exercise? If so, were you surprised by this? The activity arises from an assumption that the way a person defines teaching and/or learning is influenced by their views of schooling and/or the role of schooling in society. There is, therefore, no right or wrong answer to this question but for your purposes it is useful to have a working and shared definition of teaching. A possible working definition of teaching is: *a process in which one or more people assist other people to develop themselves in some or other way*. By implication, learning would be the development process itself.

Teaching and learning processes could take different forms, e.g. transmission of knowledge through telling; through demonstration, through discussion, through problem-solving and experimentation. But the processes always involve the acquisition of *something*, e.g. knowledge, skills, values, attitudes, etc. You can call this *something* that is acquired through teaching and learning, the *curriculum*. And, as you learned in Unit 1, the instructional leadership provided by principals and their teams has a marked influence on the ethos and effectiveness of the school in the provision of quality teaching and learning, within the organisational structures and context of their schools. Therefore, in order to lead and manage a curriculum effectively and efficiently, school leaders first need to understand fully what curriculum is.

#### Activity 14: Define curriculum

**Suggested time:**

45 minutes

**Aim:**

To understand how curriculum can be interpreted and defined.

#### What you will do:

1. How do *you* define curriculum? Write down your response and then discuss it with a member of your school-based CoP to compare your responses.
2. So, did your responses agree and, if so, did you write down this agreed definition or the two definitions?
3. Have you been exposed to different types of curricula during the course of your teaching career? Do you have a particular preference in this regard and if so give reasons why?
4. Imagine that a member of your school-based CoP has no idea what a curriculum is – they have never heard the term before. Take turns explaining *curriculum* to each other with the listener interrupting the speaker and asking questions that will force the speaker to express themselves clearly.
5. In explaining what the term means, think back to any discussions and training you and your colleagues have had on curriculum. If you have been teaching for a long time, you can also use your experience of managing the design and implementation of earlier learning area programmes based on Curriculum 2005 and the NCS that preceded the current CAPS.
6. Did you find it easy to explain? Or did you find it frustrating not being able to explain a concept that you thought you understood? What was the main focus of your explanation? Did you focus on policy or practices? Did you explain curriculum in terms of content, outcomes, or process?
7. Keep your response in your Learning Journal.

## Discussion of the activity

The discussion that follows will help you in developing a greater understanding of, and confidence in, curriculum theory and practices. Thinking about these questions and providing answers, will help you to focus on what curriculum leadership involves for teaching and learning. At the end of the unit you should be more confident of the ideas – the theory – behind different definitions of curriculum.

So, what is curriculum? There are different ways of looking at curriculum both as a concept and as something that has to be led and managed by you, as the instructional leader. You might have thought of the following:

- Curriculum as plan;
- Curriculum as practice;
- Curriculum as social construct.

### Curriculum as **plan**:

In this case, curriculum is seen as a *document* or a *blueprint* for teaching. It is sometimes also referred to as a *syllabus* if it includes in detail the content to be taught, how it should be presented (methodology) and how it should be assessed. It is also known as the *official* curriculum, the *formal* curriculum or the *intended* curriculum. A syllabus approach to curriculum planning tends to be associated with a transmission type, content-focused teaching approach. However, the NCS is an official, formal curriculum plan that is not based on what would normally be referred to as a *syllabus*, nor is it merely a rigid *blueprint* as some scope is created for different approaches, and even different content. CAPS which is a revision of the NCS, represents a formal and more prescribed curriculum.

### Curriculum as **practice**:

Here the emphasis is shifted from *what is intended* to *what actually happens*. The focus here is on the experiences of both the teacher *and* the learner. The curriculum as practice may also be known as the *experienced* curriculum, the *actual* curriculum or the *implemented* curriculum.

### Curriculum as **social construct**:

The key idea here is that a curriculum is constructed by certain people within a society (usually in the national department of education or one of its agencies) who have a particular ideology [set of beliefs and values]. The curriculum states what knowledge, skills and values these people believe are important for the learners in that society to acquire. So, you can think of this as a generally shared understanding of what a curriculum might be, for example, learner-centred, outcomes-based and value-driven. In this interpretation, it is not only what gets into the formal curriculum that is of interest, but also what is left out and why.

A fourth interpretation is also possible – curriculum as praxis.

### Curriculum as **praxis**:

This is an extension of the previous notion. Praxis is concerned with the transformative potential of experiential learning, critical reflection and action directed at the aspects of education that need to be transformed. It is about bridging the divide between theory and practice and it is concerned with democratic decision-making and the empowerment of people in the process (van den Berg 2014: 103).

Now, having been introduced to the concepts above, you can return to the questions that you answered earlier. Your answers may have reflected some of the above key points, or may be more similar to one or



more of the above perceptions of curriculum that have dominated theoretical debates for a long time. These can be summarised as follows:

- Curriculum as *input*;
- Curriculum as *process*;
- Curriculum as *product*.

If your explanation focused on curriculum as *things* that must be taught or learnt – in other words, the *input* – then you would fall into the first category. If your explanation focused on the way teaching and/or learning happens – *in other words, process* – then you would fall into the second category. If your explanation focused on outcomes/end results or *product* of education, then you would fall into the last category.

But the distinctions between these categories are not clear-cut, as you can no doubt recognise. Many teachers and principals are as concerned about the way, the *process*, in which teaching and learning happens as they are about the end results, the *product*, of education. For this reason, the theories informing these three different understandings of curriculum often overlap. What, for example, does *content* refer to? Is it only bodies of knowledge, or does it also include skills, practices, values and attitudes? Are the things that are learnt and the ways in which they are learnt not so integrated that they cannot be categorised separately? Other questions may include whether it is possible to have a curriculum without content and if so what such a curriculum would consist of?

You will explore the various theoretical underpinnings of curriculum debates if you proceed to further study at National Qualifications Framework Level 8, whether as part of an academic BEd Hons or a professional Post Graduate Diploma. For the purposes of the current discussion, however, you should also be aware of the concept of the *hidden* curriculum.

## The hidden curriculum

This section introduces you to what is called the *hidden* curriculum. You may have realised that one thing that stands out about all the definitions of a curriculum is that it seems always to be a written document. Written curriculum documents, often referred to as the *official* curriculum, indicate what content should be taught and learnt in the various subjects, but do they manage to capture everything that is, in fact learnt? For example, suppose a mathematics teacher in a co-educational school, i.e. one for boys and girls, while teaching long division, gives their attention only to the boys. So although everybody is learning long division – the official learning content – because of the way the teacher is teaching, the learners might also be learning that the ability to master long division is more important for boys than for girls. This *learning content* is not written down anywhere – its learning is purely incidental and, possibly, not even intended by the teacher concerned. It is *hidden*, yet it is being taught and learnt through the *unconscious acquisition* of the attitudes and beliefs of this teacher, i.e. that he is gender biased. This is the *hidden* curriculum in action.

### Activity 15: Understand the hidden curriculum

**Suggested time:**

1 hour

**Aim:**

To examine and determine the extent of the hidden curriculum in your school.

**What you will do:**

1. Have you ever considered whether your school has a *hidden* curriculum? How would you know if it has? Have you ever thought about *what* this might mean for what else is learnt in addition to the *official* curriculum, and *how* learning happens in your school? Why is it important that leaders are aware of any *hidden* curriculum?
2. If such a curriculum exists, what should be done to eliminate any negative aspects and to make explicit any positive aspects? How could this be done in your context?

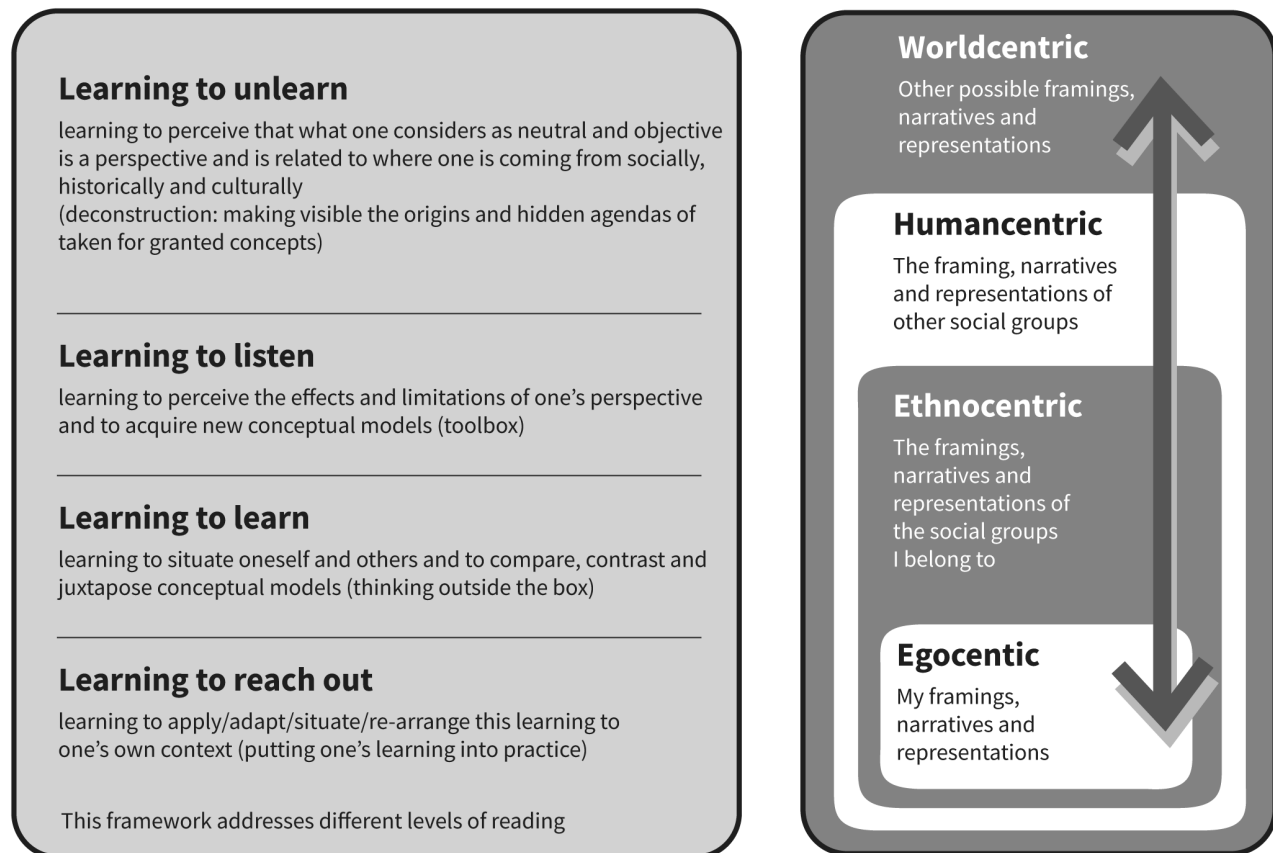
You might want to email or WhatsApp six other teachers in other schools in your cluster to ask them this question regarding their schools. If so, write down their responses and compare them with yours. What might these responses tell you, for example, about how teachers view the role of learners in the classroom as well as in school leadership?

Now consider this statement: "Learners also learn from participation in a range of *other school activities* such as assemblies, non-uniform days, extra-mural activities, field trips, sports trips and fund-raising events." Do you think that the *other school activities* are a part of the official curriculum in your school? State your reasons for your views. Discuss with a member of your school-based CoP. What views do you encounter, and are they similar to, or different from yours?

3. Keep your response in your Learning Journal.

**Discussion of the activity**

Examples of the *hidden* curriculum that can be found in a school, such as in gender representation, i.e. the percentage of senior positions held by males and females in a school; by the way members of the school community (teachers, learners, parents, cleaners) interact with one another; the different ways in which boys and girls are given tasks in and outside of the classroom, and how they are punished. It may also be in the way in which different religions are given preference or greater status, and the way learning and teaching support materials (LTSMs) and displays are used in classrooms to reflect class, gender and/or race, all of which may appear to support or endorse stereotypical attitudes or prejudices. It is important to recognise that your own assumptions about the nature and purpose of life in general, and education provision in particular, shape what you perceive and what you do. You need to be able to critically examine your own assumptions, to compare your assumptions with those of others and be willing to listen, to learn and sometimes to unlearn, as depicted in Figure 4.



**Figure 4: A conceptual framework for curriculum transformation**

(Source: Andreotti & de Souza, 2008: 4)

You might like to watch the TED Talks by Charles Leadbeater to give you another view of possible curriculum innovation and implementation in schools. A researcher at the London think tank Demos, Charles Leadbeater was one of the first people to notice the rise of *amateur innovation* – great ideas originating outside the traditional sphere, from people who suddenly have the tools to collaborate, innovate and make their expertise known.

Leadbeater, C. 2010. *Education Innovation in the slums*.

[https://www.ted.com/talks/charles\\_leadbeater\\_on\\_education#t-227387](https://www.ted.com/talks/charles_leadbeater_on_education#t-227387) (Duration: 18.58).

Leadbeater, C. 2005. *The era of open innovation*.

[https://www.ted.com/talks/charles\\_leadbeater\\_on\\_innovation](https://www.ted.com/talks/charles_leadbeater_on_innovation) (Duration: 19.01).

As you have seen from the foregoing discussion, many factors impact on what happens with respect to the curriculum. Taylor (1999) provides a useful systemic overview of these influences noting how the *intended* curriculum may be influenced by national, school and classroom goals and contexts. The *implemented* curriculum may be influenced by factors such as teacher qualifications, experiences, belief systems and contexts of practice influenced in turn by the ways in which schools are resourced, supported and evaluated. The *attained* curriculum will be influenced by learner characteristics, such as general background, household economic capital, household cultural capital, attitudes, aptitudes and expressions.

Hoadley, however, observes a worldwide trend towards more *progressive* forms of teaching and learning in the schooling sub-sector, characterised by the following features:

*Curricula that place more emphasis on integrated knowledge in which different subjects are combined into 'learning areas' and taught thematically;*

*An increased focus on the competence demonstrated by learners at the end of a process of learning rather than on subject content knowledge;*

*Greater concern for the knowledge that learners bring to the class and on the linkages between school knowledge and everyday knowledge. (Hoadley, 2012: 5–6)*

The formal school curriculum changes in response to the changing needs of society, changing political leadership, the findings of researchers on the impact and effectiveness of the current curriculum, and a host of other factors. For example, the current focus is on CAPS but in two to three years' time, the focus might have shifted – perhaps in response to stronger calls to decolonise the curriculum and/or in response to national and international data on learner achievement. For example, during the writing of this module, a debate was unfolding about the role of Life Orientation in the National Senior Certificate and whether History should be made compulsory at this level. Although such changes often involve consultative processes, it is not possible to consult all teachers in the education system and so ways need to be found to communicate the changes to those who must implement them. In South Africa, education authorities have typically made use of a cascade model in which a small group of practitioners are trained who then train others who in turn train yet others until, hopefully, everybody has been reached. The word *cascade* comes from the movement of a river as it runs down over a series of rocks into pools over more rocks into more pools and so on, creating a series of small waterfalls as it goes.

### Activity 16: Curriculum implementation and cascade training

**Suggested time:**

30 minutes

**Aim:**

To deepen your understanding of *cascade training* models [cascade or train-the-trainer systems involve training a small group who then pass on what they know to the rest of the workforce] and identify more effective methods.

**What you will do:**

1. Have you had experience of cascade training and if so what was its impact on you and your schools?
2. If you have not been part of cascade training, then ask a member of your school-based CoP what they experienced. What training would you (or they) have wanted done differently in your context?
3. From the responses, give your views on cascade training and try to identify the reasons for successes and/or failures in your context and experience. Suggest what could have been differently, why and how.
4. Reflect upon and discuss with a member of your school-based CoP.
5. Keep your response in your Learning Journal.

## Discussion of the activity

Even with the existence of multiple curriculum implementation models and training methods, very few curriculum innovations have proved sustainable or have sufficiently achieved their original goals or objectives. One of the explanations for this could be that curriculum innovations have not been sufficiently focused on organisational change, i.e. changes in the structure and culture of the institutions where curriculum changes were to be made. If these had been addressed, attention would, for example, have been paid to teacher and learner roles, interaction between school and community, school ethos and value systems, and organisational structures. All of this would have had a marked effect on the interpretation of, and response to, proposed innovations. You will explore more of these organisational factors and their possible impact on curriculum implementation in *Module 6: Leading and managing the school as an organisation*.

Researchers (Botha, 2016) have compared innovations that were successfully implemented with ones that were not. The research indicates that, in cases where people were *co-opted* to implement innovations, they simply modified innovations to suit the *status quo* in their institutions (i.e. business as usual) or ignored them altogether so things went on very much the same way as they did in the past. However, where implementers *owned* the innovations, institutional settings were changed to accommodate innovations and participants also changed (i.e. business unusual). Consequently, the implementation of the innovation tended to be successful. This, the researchers argued, could be ascribed to the interaction between participants, the leaders (change agents) and the innovation itself – an interaction characterised by mutual adaptation. You will learn more about this in *Module 4: Leading and managing people and change*.

Importantly, the willingness of the organisation to consider something *new* depended to a large extent on the attitude of the leadership. If by their words or actions they *signalled* disapproval or hostility to the innovation it was likely to fail. In the early days of Curriculum 2005 principals were not part of initial training processes and many were unconvinced of the merit of the proposed changes and, therefore less committed to implementing them. Teachers who *picked up* on these attitudes were therefore unwilling to invest extra time or effort in the innovation with the result that very little changed (Fleisch, 2008).

Based on their findings, researchers concluded that a successful implementation strategy is one that includes at least local materials development, concrete staff training, and full support and encouragement from the school leaders to be coupled with frequent/regular staff meetings. This finding reinforces the discussion in Unit 1 as well as the instructional core model introduced at the start of this section and which in turn informs the discussion that follows.



## Section 2: Curriculum planning and implementation

*There is no substitute for good planning: the best way to prepare for a successful school year is to plan it that way. Planning needs to start well before the start of the year, and ideally all staff need to be issued with a programme for the year before they return to the school at the start of the school year. The principal and school management team therefore need to have the year programme for the following year finalised before school closes at the end of the previous year. (Clarke, 2007: 228)*

It is important to see curriculum planning and implementation decision-making as a process that is repeated and not a once-off event. It is also important to focus on key questions and check that you will be able to provide the necessary resources and support, both to learners and teachers, in each aspect of programme implementation. A useful approach is the *curriculum in development* process advocated by Thijs and van den Akker (2009). The model can be applied at the macro level of national school curriculum planning; at the school level for contextualised phase and grade planning; as well as at the classroom level for specific lesson planning.

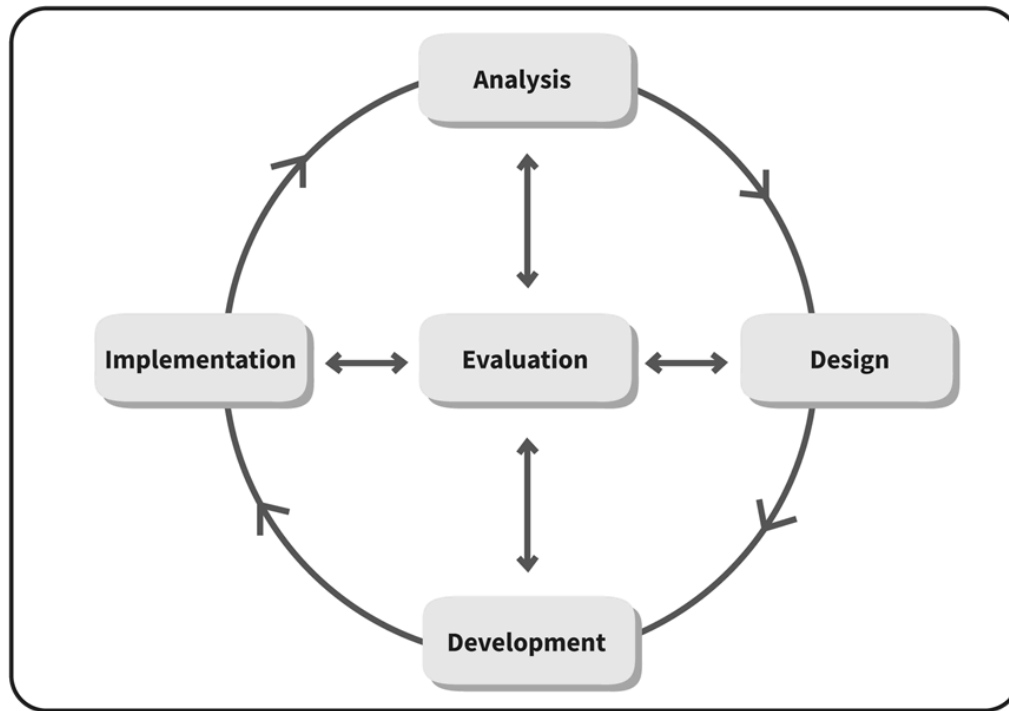
Table 1 below identifies key questions that need to be asked about the learners and their learning (rather than a focus on content or on the teacher).

**Table 1: Curriculum components in question form**

Component	Core question
Rationale	Why are they learning?
Aims and objectives [outcomes]	Towards which goals are they learning?
Content	What are they learning?
Teacher role	How is the teacher facilitating their learning?
Materials and resources	With what are they learning?
Grouping	With whom are they learning?
Location	Where are they learning?
Time	When are they learning?
Assessment	How is their learning assessed?

(Source: Thijs & van den Akker, 2009: 12)

The questions asked in Table 1 are addressed repeatedly during the curriculum discussion process as illustrated in Figure 5 below.



**Figure 5: Core activities in curriculum design and development**

(Source: Thijs & van den Akker, 2009: 15)

In a new curriculum cycle, it is necessary to ask the following kinds of questions in the following sequence:

**Analysis:** This phase involves answering questions like:

- What do relevant stakeholders, including learners, suggest about what should be taught, how it should be mediated, i.e. scaffolded, and how it should be assessed?
- What contextual factors will impact the curriculum, e.g. access to connectivity and ICT?

**Design:** This phase involves answering questions like:

- What needs to be learned?
- In what order or sequence should this (the *what* of learning) be organised?
- At what pace (how fast) should the learning take place?
- Who is learning and who is teaching?
- Where should learning take place?
- When should learning take place?
- How should learning take place, e.g. in groups, individually, in workshops, or in lectures?

All of the responses to these questions need to be informed by the findings of the analysis.

**Development:** This phase involves answering questions like:

- What resources will be needed, e.g. textbooks, workbooks, videos, lab equipment, etc?
- How will they be sourced and disseminated?



**Implementation:** This phase involves asking questions like:

- How should the learning experiences be organised, e.g. in or out of the classroom?
- Should individual, pair, small group or whole group approaches be used?

**Evaluation:** This phase focuses on questions like:

- How well did you do?
- Where and how can learning be improved?

Questions like this need to be asked formatively within each phase as well as summatively at the end of each curriculum cycle.

You will have noticed that the arrows in Figure 5 point both ways. This is to show that during the curriculum design and development process, you should expect to often find yourself going back to an earlier point in the process, or looking ahead to a later point. Curriculum review and revision can be sparked at any point of the process.

So, curriculum analysis, design, development, implementation and evaluation are elements of a continuous process – you use evaluation both formatively during the process and summatively at the end of the process to gauge how well you are doing. There is always room for improvement (COL/CHE, 2018).

## Curriculum analysis

With respect to analysis, the CAPS curriculum documents outline what teachers should teach, when, and to some extent they suggest how. But these were decisions made at a national level. As discussed in the previous section, what was planned at a national level needs to be interpreted for the local needs of specific contexts and adapted accordingly to suit the needs of specific learners. This last point is a key principle of inclusive education approaches.

In this regard, a recent report from a curriculum support intervention in KwaZulu-Natal, *Jika iMfundo*, (Christie & Monyokolo, 2018), highlights two issues which will need to be addressed in most schools and classrooms in South Africa:

- Curriculum coverage; and related to this
- Multigrade classrooms.

The *Jika iMfundo* experience indicated that while the school year is nominally understood to comprise 40 weeks, in practice few schools manage to achieve 40 weeks of effective teaching. There may be delays in starting due to delayed registration processes, delays during the course of the year due to various disruptions and lost time at the end of the year because of extended examination processes. If a teacher manages to get only 30 weeks of teaching from a 40-week teaching year, it follows that they may cover only 75% of the planned curriculum. This has a knock-on effect leading to the second challenge identified. If the Grade 4 teacher covers only 75% of the planned curriculum, the Grade 5 teacher may find themselves needing to recap issues from the Grade 4 curriculum as a basis for engaging with the Grade 5 curriculum. They may, as a result, cover only 50% of the Grade 5 curriculum with obvious consequences for the Grade 6 teacher. Alternatively, the Grade 5 teacher may simply ignore the knowledge gap from Grade 4 and teach the

Grade 5 curriculum as planned. This is an approach that is likely to lead to poor attainment among learners unable to bridge the knowledge gap for themselves, especially if they do not have access to learning resources and support outside of normal teaching hours. Policy does not allow learners to continually remain in a grade until they have had the chance to master the planned curriculum. This also makes it more likely that there will be learners in classrooms who have knowledge and skills gaps from previous grades. These could be a result of time management constraints faced by the school and its teachers or learning challenges faced by individual learners themselves. The fact remains that in many classrooms throughout South Africa there are over-age children in classrooms with children much younger than they are, who may ultimately have little chance of success.

### Activity 17: Analysing curriculum coverage

**Suggested time:**

40 minutes

**Aim:**

To get a realistic understanding of teaching and learning needs based on actual curriculum coverage.

**What you will do:**

1. Identify one class that you teach. What percentage of the planned curriculum have you managed to cover this year to date? What percentage should you have covered?
2. What factors can you identify that made it possible for you, or prevented you from achieving what was planned?
3. Now think back to a lesson you taught in the past week. Did you find yourself needing to recap or teach content that should have been mastered at a previous level? Is this typical for the classes that you teach?
4. Now think about the teachers you work most closely with. To what extent does the experience in your own classroom reflect that of your colleagues? How do you know? How could you find out?
5. Based on this reflection, suggest how you and other instructional leaders in your school could support maximum curriculum coverage and reduce or limit the effects of non-coverage.
6. Keep your response in your Learning Journal or possibly in your Workplace Project (WPP).

**Discussion of the activity**

In order to be able to respond to the first question in Activity 17, you must first plan the school year. This requires a realistic appraisal of the actual time available for teaching based both on past experience as well as what you can anticipate in the year to come.

At Tirisano Secondary School it is known that the teaching year is typically shortened by four weeks due to end of term examinations and other summative assessment processes. Also, it is known that the school will be used as a polling station in upcoming elections and the authorities indicated they will need access to the school for the full week: two days to prepare and secure the venue ahead of the vote, one day for the polling and then two days to pack up. Tirisano Secondary School therefore needs to plan for a maximum of 35 weeks of classroom teaching. It would then need to prepare a plan similar to the following:

**Table 2: School-year planning**

Week	1	2	3	...	35
What must be taught					
Evidence of teaching					
Evidence of learning					

**Row 1** of Table 2 indicates that the school has planned for 35 weeks of actual classroom teaching.

**Row 2** then requires the school to map the requirements of the CAPS curriculum to the 35 weeks available.

**Row 3** then provides evidence that teaching took place in the form of lesson plans, lesson reflections, learning, teaching and assessment resources developed, etc.

**Row 4** then provides evidence of learner achievement – this will often be in written format but will also include artworks and things that have been created, as well as other forms of learner achievement such as speeches, presentations and performances. National policy sets out minimum requirements for assessment but in reality there will need to be interim forms of assessment as well. For example, a learner’s graded essay may be submitted as evidence for formal reporting requirements but typically a teacher will have provided feedback on a plan of the essay and on at least one draft prior to this. Increasingly, where possible, all of this evidence can be captured and stored in digital portfolios of evidence using basic information and communication technology (ICT) and mobile technology.

It seems probable that in some classes you will find that you are on track with what was planned and that you have appropriate evidence that learners have achieved the required learning outcomes. However, it also seems likely that in other classes, you will be behind schedule in terms of curriculum coverage and that the evidence suggests that some, or even most, learners have not achieved the intended learning outcomes. You then need to design an appropriate curriculum intervention.

## Designing appropriate curriculum interventions

An appropriate intervention may take several forms depending on the extent of the needs to be addressed. Possibilities include: carefully structured homework assignments; additional after-hours/weekend classes; summer or winter schools, etc. In designing a suitable intervention, you need to answer all the core questions set out in Table 1.

In deciding suitable responses to these questions, you need also to clarify:

- Your overall teaching approach;
- The kinds of teaching and learning activities that will be best suited to addressing the curriculum gap you have identified;
- The kinds of assessment activities that will provide appropriate evidence of learner achievement;
- The learning, teaching and assessment resources that will be needed to support the intervention;
- The support that teachers will need in implementing the intervention.

## Overall teaching approach

The European-funded Holistic Approach to Technology Enhanced Learning (HoTEL) project has developed a very useful overview of the diverse range of learning theories on which teachers might draw to make more informed decisions about innovations in classroom practice (Millwood, 2013). Arguably, the different learning theories identified in the HoTEL initiative can be grouped into three major approaches as summarised in the following table.

**Table 3: The impact of different conceptions of learning on practice**

<b>Decisions made regarding:</b>			
Communicating the curriculum	Outcomes and content finalised before programme. Apply to all learners.	Outcomes and content finalised before start but programme offers core and elective options.	Outcomes and content negotiated with learners before start of programme.
	All learners start and end at the same time and follow the same study sequence.	Some flexibility about placement, but same study sequence for all learners.	Continuous enrolment and modularisation allows multiple pathways.
	Emphasis on providing <i>finished</i> content through lectures/printed materials/multi-media/ICTs.	Emphasis on providing resources and scaffolding to enable learners to construct their own understandings, through scaffolded resource-based activities.	Emphasis on providing resources, not always complete, that reflect multiple perspectives and inviting discussion via email/website/social media, in small syndicate groups.
	Use of generic feedback offering model answers/provision of model answers to tasks.	Emphasis on individual feedback on assignments.	Emphasis on formative feedback on both individual and group tasks; feedback as continuation of discussion.
	Class activities few or used to consolidate memorisation of content.	Class activities require learners to construct and demonstrate their own understanding.	Class activities favour discussion with others and examination of multiple viewpoints and multiple resources.
	Teacher seen as expert transmitting knowledge.	Teacher seen as scaffolding learning opportunities.	
Engaging with the curriculum	Assume that learners have appropriate study skills.	Enable reflection on and development of metacognitive skills.	Enable reflection on and development of metacognitive and social skills.
	Learners expected to master content.	Learners expected to construct own understanding; therefore concern with both product and process.	Learners expected to co-construct knowledge with others; emphasis on process.

Decisions made regarding:			
	Emphasis on recall in activities, assignments and examinations.	Emphasis on problem identification and problem-solving in activities, assignments and examinations.	Emphasis on critical analysis and open-ended discussion.
Applying what has been learned	Assessment by teachers only.	Assessment by self and others.	Assessment by self, peers and teachers.
	Assessment tasks require recall.	Assessment tasks require application of knowledge in authentic situations.	Assessment tasks require reflection and application in congruent real-life contexts.
	Assessment tasks include assignment content tests; examinations.	Variety of individual assessment tasks, including portfolios.	Variety of assessment tasks, including group tasks.
Typical resources	Single prescribed textbook.	Prescribed and recommended mixed resources; with intent to set up debates.	No limits on resources consulted including idiosyncratic resources and resources co-constructed as part of the learning process.

(Source: Adapted from Mays, 2014: 121–122)

The lack of vertical lines between the table columns indicate that teachers can, and do, move between different pedagogic approaches which may serve different learning purposes and contexts at different times (Anderson & Dron, 2011). If learners have not achieved the intended learning outcomes the teacher had planned, teaching the same things in the same way again is unlikely to yield different results. You might therefore find the following advice useful:

*In spite of the criticisms and debates, there is no one best way to teach. Different goals and student needs require different teaching methods. Direct instruction often leads to better performance on achievement tests, whereas the open, informal methods such as discovery learning or inquiry approaches are associated with better performance on tests of creativity, abstract thinking, and problem-solving. In addition, the open methods are better for improving attitudes towards school and for stimulating curiosity, cooperation among students, and lower absence rates (Walberg, 1990). According to these conclusions, when the goals of teaching involve problem solving, creativity, understanding, and mastering processes, many approaches besides direct instruction should be effective. These guidelines are in keeping with Tom Good's conclusion that teaching should become less direct as students mature and when the goals involve affective [emotional] development and problem solving or critical thinking (Good, 1993a). **Every student may require direct, explicit teaching for some learning goals for some of the time, but every student also needs to experience more open, constructivist student-centred teaching as well.** (Woolfolk, 2007: 515–516, emphasis added)*

Despite the diversity of approaches, Laurillard (2002, 2006) writing in the context of higher education, argues that most education theory, at least for the past 100 years, indicates the need for active student engagement,

but teachers have been slow to use new technology, different teaching strategies and alternative learning resources to enable this (CHE, 2014). This has prompted discussion around a suitable pedagogy for a digital age (Beetham & Sharpe, 2013): one that uses the possibilities of technology to foster more engaged, co-operative and collaborative learning structured around a wide range of, increasingly digital, resources. This leads into the second framing discussion of this section, identifying suitable teaching and learning activities and technology to encourage active learner engagement.

As a way-in to the discussion in this section, try the following activity.

### Activity 18: The more things change, the more they stay the same

**Suggested time:**

40 minutes

**Aim:**

To gain an understanding of how change in practice can sometimes be only superficial.

**What you will do:**

Read through the following case study and compare it with your own experience.

**Case study: Mrs Van Niekerk, Senior Phase Teacher at Tirisano Secondary School**

Mrs Van Niekerk has been a senior phase (formerly junior secondary) teacher at Tirisano Secondary School for thirty years. She is a very committed and diligent teacher of Social Sciences (formerly she taught Geography and History as separate subjects on the timetable).

During the first year of her teaching, Mrs Van Niekerk made summaries of key concepts and key facts that she thought the learners should know. She would dictate these key ideas to her learners to copy down into their own workbooks. When the school got money for new chalkboards and chalk, Mrs Van Niekerk would write the key facts on the chalkboard for learners to copy into their own workbooks.

Some years later, the school got electricity and received a donation of overhead projectors and transparencies. So, over the school holidays, Mrs Van Niekerk transferred her key concepts and key facts to colourful transparencies for learners to copy into their own workbooks.

About five years ago, the school installed data projectors in each classroom and provided each teacher with a laptop and a licensed version of Microsoft Office already installed. So, over the school holidays, Mrs Van Niekerk transcribed all the key concepts she had put onto transparencies into slides in PowerPoint presentations which she would project in class for her

learners to copy into their own workbooks. Last year, the school installed connected interactive whiteboards in each classroom. So, over the school holidays, Mrs Van Niekerk...

### Discussion of the activity

You can probably predict what Mrs Van Niekerk did over the school holidays! Although Mrs Van Niekerk seems to be a diligent and committed teacher, and seems willing to make use of new technology as it becomes available, she is not really developing her practice nor enriching the learning experience. In a recent research project into how institutions are making use of technology, Bates and Sangrà (2011: xx) observe that “most (of 11 higher education institutions surveyed) seemed content to use technology to enhance traditional classroom teaching, rather than to use technology to transform the way teaching is designed and delivered.”

Thus, most institutions were not making use of the possibilities of technology to make the kind of teaching shifts that would better prepare learners for a 21st century connected environment.

Bates and Sangrà (2011) go on to make the following general recommendations with respect to long-term goals for technology integration in higher education institutions, and most of these could also apply to technology enhanced learning in schools:

- Increasing flexible access for a more diverse student body.
- Increasing interaction between instructors and students, and allowing for more individualisation of learning.
- Developing participant skills in identifying, collecting, analysing, and applying knowledge.
- Teaching students how information technology can be used within a particular professional or subject domain.
- Using technology to support the development of twenty-first century skills of independent learning – initiative, communication, teamwork, adaptability, collaboration, networking, and thinking skills – within a particular profession or subject domain.
- Greater cost-effectiveness: more students at a higher quality and less cost through use of technology. (Bates & Sangrà, 2011: xxi)

Achieving the kinds of shifts outlined above requires institutions to become learning organisations with the support of active instructional leadership, as outlined in Unit 1.

## Selecting appropriate learning activities

The following table outlines a range of possible kinds of activities that might be used in both in-class and out-of-class environments to encourage active learner engagement with content.

**Table 4: Activity types**

Lecture	Discussion	Group Work	Self-activity
Class lecture	Free group discussion	Horseshoe groups	Play
Speech	Controlled class discussion	Round-table groups	Project work
Paper	Forum	Syndicates	Activity cards
Story		Buzz groups	Learning contracts
Demonstration		Brainstorming	Self-study models
Symposium		Nominal group method	Programmed learning
Panel		Fishbowl	Digital devices
Simulation			
Dramatisation			
Role play			
Socio-drama			
Case studies			
Laboratory learning			

(Source: CHE, 2014: 50–51; adapted from Carl, 2009: 96)

A possible staff development activity that flows from a table like this is for each teacher to research a different activity type and then to identify a class and a topic to trial the method. Once the trial is over, they should then report back to their school-based and higher education institution (HEI) CoP on what worked, what did not work and what could be done differently to suit different needs and contexts.

Instructional leaders should have an imagination for what may be possible and overtly exemplify and support innovative practice.

So far you have explored possible teaching and learning approaches and have identified different kinds of activities that might be trialled, but how will you know whether learners have achieved the intended learning outcomes? You now need to think about when and what to assess.

## Planning assessment

Gareis and Grant, define assessment “as the process of using tools and techniques to collect information about student learning. In other words, assessment is the way teachers see their students’ learning. (Gareis & Grant, 2015: 2)

Gareis and Grant go on to identify three main types and roles of assessment in the classroom as summarised in Table 5. The table has been adapted slightly to illustrate a concept from Mrs Van Niekerk’s Social Sciences classroom: map work.



**Table 5: Comparison of three roles of assessment in the classroom**

	<b>Pre-assessment</b>	<b>Formative assessment</b>	<b>Summative assessment</b>
<b>When does assessment occur?</b>	<i>Before</i> teaching	<i>During</i> teaching	<i>After</i> teaching
<b>Why assess?</b>	<ul style="list-style-type: none"> <li>To determine the prior knowledge and/or entering skills of learners to plan teaching.</li> <li>To establish a baseline of learning to show learner growth after teaching.</li> <li>To trigger previous learning, e.g. on interpreting map scales and symbols.</li> </ul>	<ul style="list-style-type: none"> <li>To make teaching decisions in the short term.</li> <li>To provide honest, timely, specific, accurate, and constructive feedback to learners.</li> <li>To develop learners' capacity for self-evaluation and self-directed learning.</li> </ul>	<ul style="list-style-type: none"> <li>To judge the nature and degree of learning.</li> <li>To communicate the nature and degree of learning to others.</li> <li>To make decisions about the efficiency and effectiveness of curriculum, teaching and assessment in the long-term, e.g. can learners make the link between a map and a photograph of the same area?</li> </ul>
<b>What is the scope of assessment?</b>	Either <i>focused</i> or <i>comprehensive</i> , depending on the intended use.	<i>Focused</i> on particular knowledge or a discrete skill set.	<i>Comprehensive</i> of some period of teaching and some set of knowledge and/or skills.
<b>What are the typical consequences of assessment?</b>	<i>High stakes</i> if used for placement decisions. <i>Low stakes</i> if used to plan teaching.	<i>Low stakes</i> – typically related to day-to-day decisions about teaching and learning.	<i>High stakes</i> – can determine future placement/promotion, remediation, award of distinctions, etc.
<b>Who primarily uses the results of assessment?</b>	Teacher.	Teacher and learners.	Teacher, learners and third parties (such as parents and education department officials).

<b>How is the assessment typically done?</b>	<ul style="list-style-type: none"> <li>• Pre-tests</li> <li>• Interviews</li> <li>• Class discussions</li> <li>• Brainstorming activities</li> <li>• Reviews of cumulative records (e.g. from previous grade or school).</li> </ul>	<ul style="list-style-type: none"> <li>• Observations of facial expressions, body language and comments (informal).</li> <li>• Hand-raising, thumbs up/down, personal whiteboards, exit cards, personal response systems, etc. (can be informal or formal).</li> <li>• In-class guided practice (formal).</li> <li>• Paper-pencil quizzes (formal).</li> </ul>	<ul style="list-style-type: none"> <li>• Paper-pencil tests, quizzes, essays and papers.</li> <li>• Projects, demonstrations, performances, checklist observations, and original creations.</li> <li>• Standardised tests. For example, given a map and a photograph, learners can plot a journey from point A to point B in terms of distance and when they are travelling uphill, downhill or on a fairly level surface.</li> </ul>
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(Source: Adapted from Gareis & Grant, 2015: 7)

You might find it useful to pause a moment to think about the relationship between the learning purpose and approach (Table 3) and how this affects activity choice (Table 4) and the role and nature of the appropriate assessment strategy (Table 5). Can you see this relationship in your own lesson that you critiqued earlier? What might you change?

Assessment is a critical part of the teaching and learning process, but Hill and Barber say that it is still a field in need of reform and they suggest the following *ideal* features of assessment:

- Assessments that can accommodate the full range of learner abilities.
- Assessments that provide meaningful information on learning outcomes.
- Assessments that accommodate the full range of valued outcomes.
- Assessments that support learners and teachers in making use of ongoing feedback to personalise instruction and improve learning and teaching.
- Assessments that have integrity and that are used in ways that motivate improvement efforts and minimise opportunities for cheating and *gaming* the system (Hill & Barber, 2014: 5).

So what kinds of assessment instruments **should** be created?

### Activity 19: Imagining alternative assessments

**Suggested time:**

40 minutes

**Aim:**

To brainstorm some possible alternative ways of assessing.

**What you will do:**

1. Think back to all the assessment tasks you used in the past week.
2. For each task, identify at least one alternative way that the assessment could have been done.

**Discussion of the activity**

Orsmond (2004: 234), writing about Social Sciences in particular, suggests some of the following *other than test* options:

- Portfolios
- Writing (journal writing, imaginative writing, diaries and reports)
- Role playing
- Interviewing
- Surveys
- Mind mapping
- Panel discussions
- Model building
- Group projects
- Research
- Oral presentations
- Problem solving
- Use of arts (dance, music, visual arts).

For example, in exploring the Grade 8 Geography topic *Transport and trade*, it might be useful to build on learners' existing experience and knowledge of the minibus taxi industry, which might in turn lends itself to the following kinds of activities:

- A brief *survey* summarised on the chalkboard or whiteboard of how learners come to school (oral and written).
- *Mapping* local taxi routes on a local map (spatial and visual) or relief model (tactile).
- *Creating* landmark symbols (visual and creative).
- *Writing a paragraph* suggesting ways of improving safety skills (written or for visually impaired learners, braille, braille-to-text, or oral).
- Interviewing taxi drivers to find out more about the industry (oral, communicative).
- Researching the development of the taxi industry in South Africa (research – analytical) (Orsmond, 2004: 235).

This example illustrates the ways in which assessment needs to be scaffolded so that learners' engagement with concepts builds gradually. Of course, if you would like Mrs Van Niekerk to change her practice more towards these kinds of approaches, you will need to provide a lot of examples and support.

One of the challenges that many teachers experience is planning a learning experience that involves an increasing level of demand rather than simply introducing new content. This will vary from subject to subject and topic to topic.

It could be argued that one of the most important changes brought about by the curriculum reform process in recent years, is that teachers now need to help learners to develop more conceptual understanding at increasing levels of demand as they move through school, rather than simply presenting them with more facts to be learned. The challenge can be neatly summarised as follows: Now as learners advance through schools, they need to demonstrate:

- An improved ability to do things (in other words, more advanced skills)
- A higher-level understanding of content knowledge (rather than knowing more content, but at the same low level of understanding).
- A more thoughtful and reflective attitude, in other words, an ability to make and defend value decisions (Gultig & Stielau, 2012).

Bloom's taxonomy of learning in the cognitive domain has been criticised but it remains a useful guide to developing learning and assessment activities of increasing demand. It was first developed in 1956 by Benjamin Bloom and subsequently revised by Lorin Anderson and others in the 1990s. This is illustrated in Table 6 below.

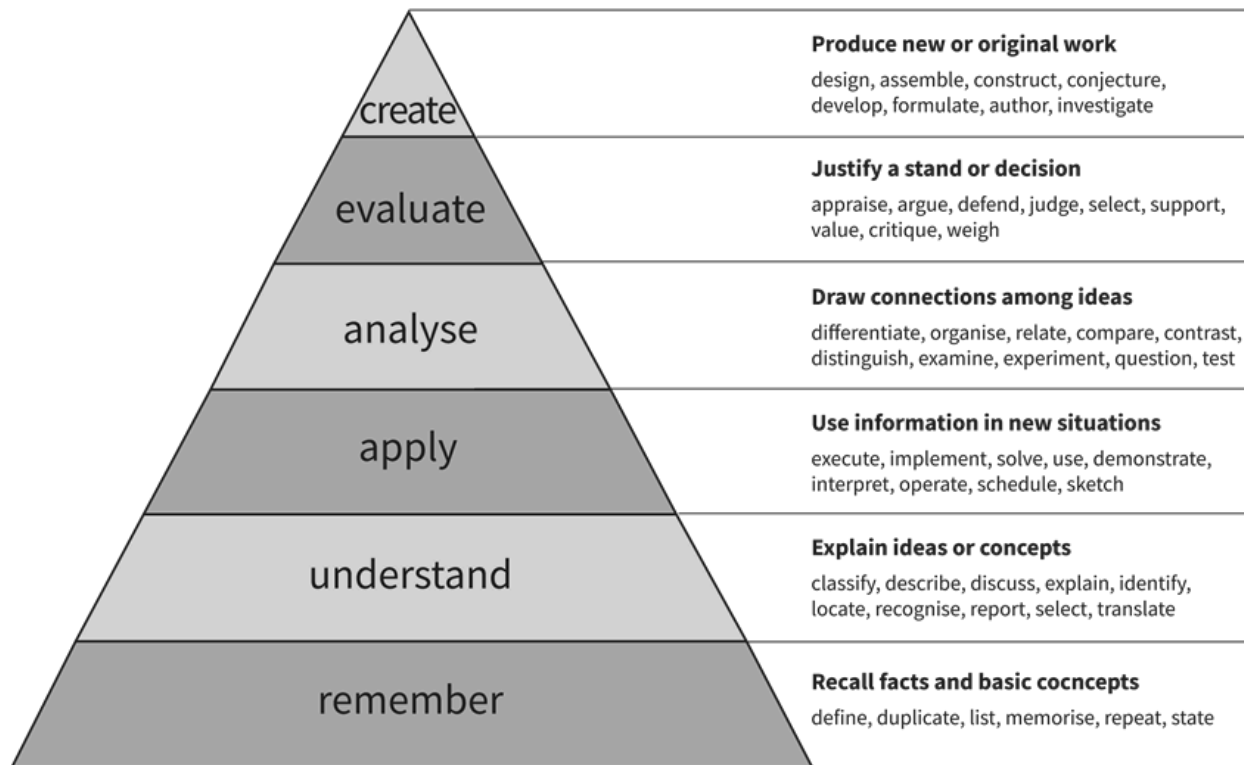
**Table 6: Bloom's taxonomy (revised) applied to learning in the Social Sciences**

Level of thinking	Type of thinking required	The kinds of action that will demonstrate that the required level of thinking has been achieved
<b>1. Remembering</b>	Learner simply recalls or recognises information as it is learnt.	<b>Emerging thinking</b> Has an awareness of the new idea or recognises the new topic, but is not yet able to use it. The learner simply recalls or recognises information as it is learnt.
<b>2. Understanding</b>	Learner can reorganise and interpret information.	<b>Developing thinking</b> Understands the general idea of the material. The learner can talk about and recognise most of the main features, ideas or events, although they may be unclear about some parts. The learner may not recognise some of the subtleties in the material, e.g. the motivation of the reporter of events in History, but can often sort them out when asked direct questions. The learner can reorganise and interpret information.
Level of thinking	Type of thinking required	The kinds of action that will demonstrate that the required level of thinking has been achieved

<b>3. Applying</b>	Learner uses information to solve a problem.	<b>Functional thinking</b> Understands most of the explicit ideas and details in the information, but may not notice some of the implicit or between-the-lines information, e.g. how different events in different places at different times may influence one another. The learner can recall and retell quite accurately, and is able to include some details, although they may not be able to explain relationships between ideas, people, events or geographic features/sub-systems. For example, the learner may not distinguish between key events, e.g. the link between the First and Second World Wars, or colonial policy and contemporary challenges, or the systemic impact of different phenomena, e.g. global warming and local weather conditions. The learner uses information to solve a structured problem.
<b>4. Analysing</b>	Learner can identify reasons and make inferences based on several pieces of information.	<b>Purposeful thinking</b> Understanding and recall of the material are generally accurate (consistent with the information provided in the prescribed resources). The learner can demonstrate understanding of the work as a whole such as retelling, summarising, making charts or flowcharts and/or drawing diagrams. The learner often makes specific reference to part of a resource to support their inferences or interpretations. Where the learner is researching or studying a particular topic, several different resources may be involved, although they may not be able to distinguish between authoritative and less credible sources of information. The learner can identify reasons and make inferences based several pieces of information.
<b>5. Evaluating</b>	Learner offers own opinion based on evidence and judges the merits of an idea.	<b>Confident thinking</b> Understands the material on both a literal (what is actually says) and inferential level (what it implies). The learner can fill in gaps and identify ambiguities (areas of uncertainty), and can pull ideas from multiple sources. They recognise the relationships between different ideas, events and processes. The learner notices detail and subtleties (small differences), and uses them to make generalisations and predictions about information, possible cause and effect relationships, possible next steps, etc.
<b>6. Creating</b>	Learner creates an original plan, proposal or design.	<b>Interpretive thinking</b> Understands both explicit and implicit ideas and information in complex, specialised and/or abstract materials. The learner can deal with ambiguity and recognises that information is selected and presented in particular ways for particular purposes and audiences. They can develop novel and innovative models and explore different interpretations of events and phenomena.

(Source: Adapted from Gultig & Stielau, 2012: 201–202)

Bloom's (revised) taxonomy is often presented as a diagram in the form of a triangle as illustrated below.



**Figure 6: Bloom's (revised) taxonomy**

(Source: Armstrong, 2016)

In addition to the general curriculum planning issues discussed so far in this section, you need to address the reality identified earlier that many classrooms increasingly have learners who have achieved learning outcomes at different grade levels. Instructional leaders therefore need to provide support and guidelines for teachers in managing such classrooms. A very practical guide has been developed by the UNESCO Bangkok office (UNESCO, 2015) which can be freely downloaded from (<http://unesdoc.unesco.org/images/0022/002201/220101e.pdf>) and which identifies the following six possible strategies that might be used at different times:

1. Teach all groups together.
2. Teach one grade while others work independently.
3. Teach one subject to all grades and at varying levels of difficulty.
4. Develop activities for non-taught groups.
5. Develop peer, cross-age and cross-grade teaching strategies.
6. Relate learning with daily experience.

You are encouraged to download this free resource to learn more about this topic.

Having decided on an overall approach and the kinds of learning and assessment activities you want to use, you can then move into the development of the necessary teaching, learning and assessment resources as well as the supporting systems and practices.

## Developing resources for a curriculum intervention

The development phase (which typically follows analysis and design) focuses primarily on the teaching role of interpreter and designer of learning programmes and materials, according to which:

*Teachers can use a wide variety of media, technology and resources in the classroom to help make the learning more engaging and authentic. We have noted in previous units the need to help learners to develop deep conceptual thinking, the ability to constantly improve and extend their skills and to become more autonomous and self-aware learners. We need to do this in ways that acknowledge the kinds of technology learners encounter in their everyday lives as well as the kinds of technology they will be required to use in contemporary and future workplaces. If our classrooms are rich with media, technology and educational resources, we can help the learners to develop the skills they will need in the real world within the safer environment of the classroom. (DHET, 2015: 60).*

Your own experience will often tell you what works and what does not. Simply being told something rarely results in new skills or changed practices.

You can begin the process of development by thinking about what the terms *media*, *technology* and *resources* might mean in a contemporary classroom setting.

### Activity 20: Media, technology and resources

**Suggested time:**

40 minutes

**Aim:**

To clarify the relationship between media, technology and resources.

**What you will do:**

1. Think back to something relatively complex you learned in the last week or two.
2. What process/es helped you to learn?
3. What resource/s helped you to learn?
4. What technology/ies helped you to learn?
5. What then is the relationship between resources, technology and media?

**Discussion of the activity**

For the purposes of the discussion in this section:

**Media** refers to ways of communicating – six main ways are suggested here, but you may be able to think of others:

- Face-to-face
- Text and images
- Audio
- Video
- Multi-media
- ICT and internet enabled.

**Technology** refers to both a way of thinking about solving problems using systematic techniques, skills, methods and processes as well as specific tools which might range from low-tech pencil and paper to high-tech smartphones.

**Resources** refers to specific examples of materials, people or knowledge that can be used to achieve educational goals.

The following table provides some examples of the kind of issues you need to make decisions about. Responding still to the concerns about Mrs Van Niekerk's teaching, the table uses examples related to the teaching of Social Sciences.

**Table 7: Media, supporting technology and educational resources for teaching Social Sciences**

<b>Media</b>	<b>Supporting technology</b>	<b>Example resources</b>
Face-to-face	Chalk and chalkboard. Overhead projector (OHP). Laptop and data projector.	Teacher's and learners' experience. A set of transparencies on forms of government. Presentation on human migration patterns.
Text (including graphics)	Printed media. Digital media.	Textbooks, reference books, newspapers, magazines, posters, workbooks, worksheets, maps, photographs. Textbooks, reference books, newspapers, magazines, presentations, workbooks, worksheets, maps, photographs.
Audio	Radio broadcasts. Podcast. CD/DVD. MP3/MP4 files on flash drive Telephone or cell phone.	For example, a discussion of an important event like Heritage Day could be listened to live on radio or shared in a digital form for discussion at a different time using a variety of digital formats and tools. A teleconference could be held with an important speaker unable to come to the school campus.
Video	Television broadcast DVD or video podcast, e.g. YouTube Video conferencing via smartboard, smartphone, or computer.	For example, learners might watch a documentary on the causes and effects of climate change and then discuss how to mitigate the challenges.
Multi-media	Combination of video and text Combination of face-to-face, text and video; other combinations.	For example, textual subtitles can be added to a video for learners who are deaf or hard of hearing. For example, watch a film version of a historic event; pause at key points to discuss differences between the film version and the textbook version; discuss reasons for the differences.
ICT enabled	Stand-alone: Computer-based workstation, CD-ROM/ DVD, flash drive.	Presentation of information or knowledge. Simulations. Interactive exercises and assessment. Open educational resources (OER).



Media	Supporting technology	Example resources
	Networked: Linking computer-based workstation, CD-ROM/DVD, or desktop PCs to public (internet) or private (intranet, LAN, WAN) networks; OER repositories; Virtual worlds or avatars.	Presentation of material and/or resources integrating all above media (text, audio and video) and possible applications. Simulations and virtual role plays. Assignment submission, assessment and feedback. Conferencing data, audio, video.
	Emergent: Cloud computing and applications like Dropbox or Google Docs; learning management systems (LMSs) and personal learning environments (PLE) and massive open online courses (MOOCs).	Provides access to the same large file from multiple points of entry. Resource list can be synchronised automatically. Documents can be edited and updated by multiple distributed people. Offers a series of online activities based on resources.

(Source: Segoe & Mays, 2017: 115–117)

Table 7 shows that media, technology and resources can take a wide variety of forms and sources and that they have implications for how you plan, as well as the support needs of both teachers and learners. For example, learners may need explicit support in accessing and using digital resources. Teachers may need the same support but in addition may also need coaching and/or mentoring regarding finding, evaluating and adapting appropriate resources. Teachers might also need help with copyright and plagiarism issues.

Designing learning interventions and sourcing, adapting or creating supportive learning resources should be a collaborative and team-based effort rather than the responsibility of individual teachers working alone and in isolation. Examples of online CoPs in this regard include:

- At the Early Childhood Development (ECD) level, African Storybook
- (see <http://www.africanstorybook.org/>)
- At the primary level as well as secondary science, Teacher Education Sub-Saharan Africa (see <http://www.tessafrica.net/>)
- At the secondary level, NotesMaster (see <https://notesmaster.com/>).

### Activity 21: Design, develop and implement a curriculum intervention

#### Suggested time:

8–10 hours over several days

#### Aim:

To gain a first-hand experience of designing, developing and implementing a curriculum intervention with a view to gaining a better understanding of the support needs of learners, teachers and school systems.

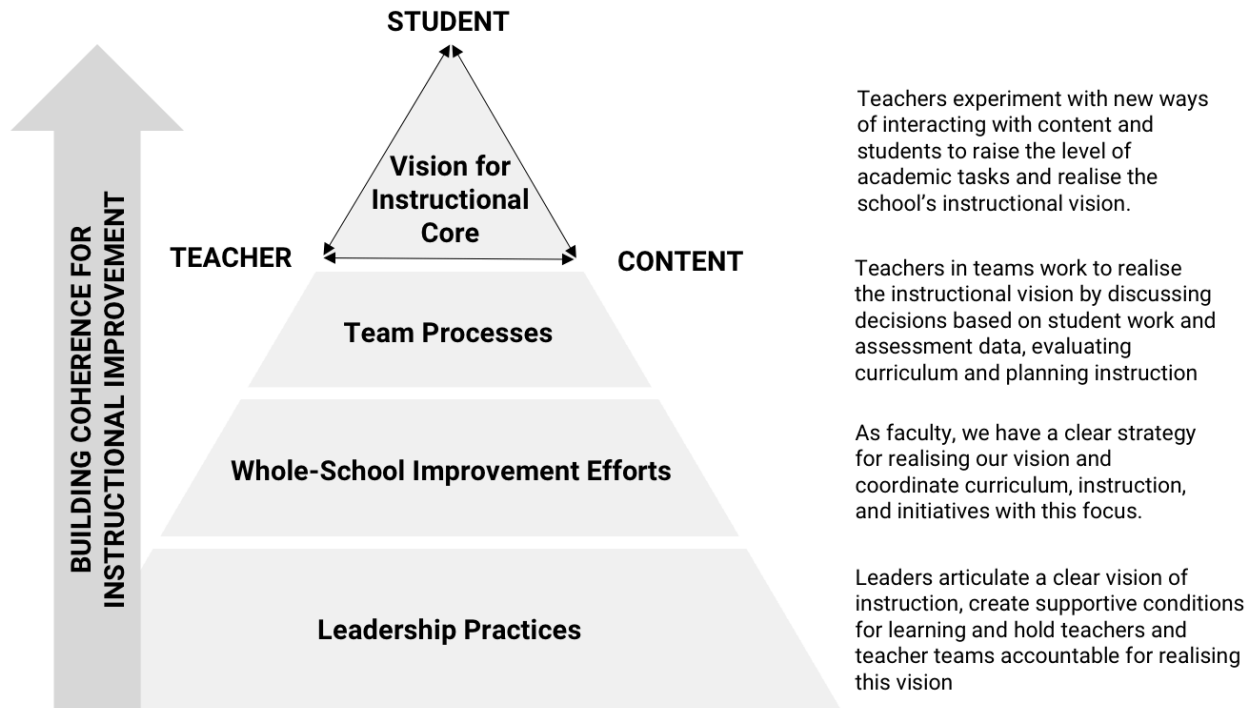
**What you will do:**

1. Select a lesson that you taught in the past week in which learners did not achieve the learning outcomes that you planned.
2. Analyse what did not work and why.
3. Design a new intervention, explicitly writing out your teaching and learning approach, and using and justifying an alternative set of teaching and learning activities and assessment approaches.
4. Develop (or source or adapt) the learning resources necessary to support the revised lesson.
5. Re-teach the lesson and write a response in your Learning Journal on what worked and why you say this; what did not work and why you say this; what you will do differently next time you teach this topic and why you say this.
6. Now, on the basis of your experience, identify what support learners, teachers and established school systems and procedures will need in order to benefit positively from this kind of process.
7. Test out your ideas by identifying a teacher who has asked for your support to improve an aspect of their teaching. Then work through a similar set of issues as the ones identified to help them improve their practice. Modify your ideas from Step 6 in light of this experience.
8. Together with the teacher, present what you did to the wider school community in the form of an internal Continuous Professional Development (CPD) session. Include in your presentation: an explanation of the challenge you sought to address; the decisions you made about teacher roles, learner roles and learning resources and why; a description of what actually happened; how you assessed the learning and what the assessment told you about how well you had addressed the initial challenge; and your shared recommendations for future practice.
9. Keep your response to Point 8 in your Learning Journal, or possibly in your WPP.

**Discussion of the activity**

The discussion in this section focused on curriculum planning and implementation with specific reference to models and approaches that could be used in designing and implementing curriculum change. You should observe that no matter how good the innovation or the plan is, it will fail unless the organisation, its leaders and those working in it are convinced of its need and are given co-ownership of the implementation process. This is one of many challenges school principals and their leadership teams face in leading and managing curriculum change. This will be discussed in more detail in the next section which focuses on curriculum monitoring and evaluation.

The following diagram summarises the key issues that you should take away from this experience.



**Figure 7: Improving teaching and learning requires both leadership and management**

(Source: Elmore, Forman & Leisy Stosich, 2014: 3)



## Section 3: Curriculum monitoring and evaluation

This section emphasises the importance and value of curriculum monitoring and evaluation, not only in terms of the quality of the curriculum design and/or implementation but also in terms of the extent to which the curriculum does what it is supposed to do. Boulmetis and Dutwin (2000: 4) define evaluation as “a systemic process of collecting and analysing data”. They indicate that the reason for data [information] collection could be to “determine whether and to what degree objectives have been, or are being, achieved”, and to make a decision based on this. Ornstein and Hunkins argue similarly, by defining evaluation as a process or “a cluster of processes” (Ornstein & Hunkins, 1993: 324) aimed at the collection of sufficient data which teachers can use to plan and make decisions regarding the way forward.

It is difficult, therefore, to draw clear distinctions between different types of evaluation in terms of their respective purposes. What would be more worthwhile would be to uncover the assumptions informing different evaluation approaches; in other words, what kind of thinking makes people choose one kind of evaluation approach rather than another. As Boulmetis and Dutwin (2000) indicate, the reason is to determine whether or not objectives have been achieved, it suggests that the evaluator is interested in *the effectiveness of the programme/process* being evaluated. If, on the other hand the evaluation process has *the collection of data for decision-making* as purpose, it suggests that the evaluator regards evaluation as part of something bigger, something that *contributes to the whole*.

The evaluator’s philosophical position [beliefs] is also evident from the procedures they use to collect information. Some evaluators would first formulate objectives for the evaluation and then work out a step-by-step plan for the collection, analysis and use of the data. This can be called a rational-scientific approach as it focuses on the use of scientific methods and reasoning to collect and analyse data. Those with a humanist position (interested in understanding why human beings do the things they do), would be more interested in the impact of whatever is being evaluated rather than on the achievement of objectives. These evaluators would go into the *field*, observing and writing down *what* happens, as it happens.

As you have seen, just about everything can be evaluated – performance, processes, practices, structures, programmes, context, people, etc. However, all of these *things* are typically evaluated in terms of quality (*how much* or *how good*) and/or quantity (*how many* or *to what extent*). Kirkpatrick (1994) in Boulmetis and Dutwin (2000) mentions, for example, that evaluations could be aimed at (qualitatively) determining or (quantitatively) measuring all of the following: programme effectiveness, the impact of the innovations, the participants, the participants impressions of the innovation, and the return on the investment the organisation made in the innovation. Boulmetis and Dutwin (2000) state that evaluation typically focuses on one of three things: *effectiveness, efficiency* or *impact*.

### Activity 22: What is evaluation?

**Suggested time:**

45 minutes

**Aim:**

To deepen your understanding of key aspects of evaluation and its use in your school context.

**What you will do:**

1. What do each of the terms in italics mean to you: *effect*, *effectiveness* and *efficiency*? What, for example, do you understand are the differences between *effect*, *effectiveness* and *efficiency*?
2. Write your response in three short paragraphs (8–10 typewritten lines in length). Give examples from your school context on whether evaluation is done, how it is done and whether the focus fits in with Boulmetis and Dutwin's model to explain your response.
3. Discuss with a member of your school-based CoP. Were you in agreement?
4. Keep your response in your Learning Journal.

**Discussion of the activity**

Consider your responses in relation to the argument stated by Boulmetis and Dutwin (2000) below. Did you come to the same conclusions and is this reflected in your written response? They say:

- Something is *effective* if its pre-specified goals, aims or objectives have been achieved or realised.
- Something is *efficient* if the goals were achieved in the minimum time, within budget constraints and with minimal disruptions.
- Something had an *impact* or *effect* if you can see a difference – positive or negative – as a result of the implementation of the *thing* that is being evaluated.

### Activity 23: Evaluating a curriculum implementation – a school case study

**Suggested time:**

1 hour

**Aim:**

To deepen your understanding of the evaluation process and its importance in ensuring quality teaching and learning.

**What you will do:**

1. In this activity you will develop a case study of a curriculum evaluation process in your school. The following steps will guide you to writing your case study:
  - a. Describe *what* the curriculum implementation was that was being evaluated, then *why* and *how* this curriculum implementation process took place.
  - b. Describe the roles of those involved in the curriculum implementation, and those who evaluated – whatever their leadership spheres of influence, including the principal.
  - c. Analyse (a) and (b) above, i.e. explain clearly whether this curriculum implementation was *effective*, *efficient* and had *effect* [impact] or not. Give reasons *supported by evidence from your analysis*. Would you say the impact was positive or negative? Always remember that you must support your response with details and evidence from the process.
  - d. Conclude your case study by:
    - i. explaining how this evaluation has helped you to understand the importance of evaluating curriculum, and
    - ii. saying how it might help you to decide on a curriculum orientated improvement project which you may want to undertake as your Workplace Project (WPP).
  - e. This conclusion must be written in well-structured paragraphs (10–12 typewritten lines in length).
2. Discuss your case study and analysis with a colleague from your school-based or HEI CoP.
3. Keep this response in your Learning Journal.

**Discussion of the activity**

Your case study is individual to your school context of course, and how and why the type of evaluation and the evaluators were chosen. But there are various models of evaluation that could be used to determine the impact of new programmes or processes on educational life. For example, external evaluators could observe and participate in classroom activities, asking questions about what goes on not only in the classroom but

also in the school as a whole. They could also analyse learners' work and/or teacher portfolios with a view to determining the *tone* of the curriculum in action. This means that, depending on the relationship between the evaluator and the evaluatee [whoever is being evaluated], this process could be experienced either as supportive or as threatening, especially if the evaluator is perceived as *inspecting* the teacher. The latter was one of the criticisms levelled at what was then named the Department of Education when the initial quality assurance policy was implemented in 2001. But whatever model is used, it is in the school's and the teachers' interests to build in evaluation processes when curriculum initiatives are implemented. This principle should apply whether an evaluation is nationally prescribed as part of CAPS or it is an evaluation that is part of the school's own initiatives for its context. This would then form part of the internal monitoring processes of what is being taught and how: ideally in a non-threatening process agreed upon by all staff. The process would strengthen the development of CoPs, with the school as a learning organisation as you learnt in Unit 1. Unit 3 looks at monitoring and quality assurance within the classroom in more detail.

Taba (1962 cited in Ornstein & Hunkins, 1993: 349) maintains that evaluation should be a *cooperative* activity which involves school leaders, teachers, parents/carers and learners. This viewpoint was based on evidence that many evaluations tend to create a sense of fear or intimidation in evaluatees. Moreover, no decision, whether it is a decision on data collection processes, resource allocation, adjustments, or whatever, should be taken by a single individual, and no decision should be regarded in isolation. The decision should be based on the impact or consequences identified, in relation to all other elements which should be considered. This is especially true with regard to curriculum evaluation since even the slightest change could have a radical effect on its target audience as well as on those who are responsible for its delivery, leadership and management.

In relation to this viewpoint, Fetterman (2001) developed what he refers to as an *empowerment evaluation model*. Crucial to this model is the notion that school self-evaluation leads to school self-improvement and, eventually to programmes and practices of a higher quality. The thrust of *empowerment evaluation* is, therefore, to help others to evaluate their own programmes and practices.

*Empowerment evaluation* is a 3-step process, facilitated by an empowerment evaluator but with all participants having an equal say in all decision-making processes. The three steps are: developing a mission, vision or unifying purpose; taking stock of the programme, i.e. determining where the programme stands in terms of its strengths or weaknesses prior to the evaluation process; and planning for the future by establishing goals and/or objectives and selecting strategies for their accomplishment. As part of this process, empowerment evaluators help staff members and other participants to determine the type of evidence they need to collect, document and monitor to ensure the credibility of the results. The emphasis of empowerment evaluation is on programme development, improvement and lifelong learning. Consequently, "training, facilitation, advocacy, illumination, and liberation are all aspects – if not developmental stages – of empowerment evaluation" (Fetterman, 2001). You should take a moment to reflect on what this process might mean for your school as you move to Unit 3 and a discussion of school- and classroom-based practices for the improvement of teaching and learning.

## Conclusion

You have reached the end of Unit 2. You should now have greater knowledge of curriculum in terms of definition, process, and product. You should also have a clearer understanding of what curriculum analysis design, development, implementation and evaluation entails. This includes how this knowledge could be used in leading and managing the learning school as instructional leaders whatever your sphere of influence,



within your school context. In this unit, you have seen that curriculum is not a fixed concept. No matter how detailed the plan, there are always variations in classroom practices. In addition, the curriculum as actually experienced will be influenced by *hidden*, unwritten factors such as the nature of the relationship between people at the school, the way in which the school is organised, and the context in which it is located.

South Africa's NCS and now CAPS, though the latter is arguably a little more prescriptive, is open to some interpretation and flexibility. Thus schools can plan the curriculum in ways that speak to the particular realities and needs of their school contexts. This is critically important given the widely varied, and in many instances very challenging, school contexts and inequalities which exist in education resources and infrastructure across the country. So although the same outcomes and assessment standards need to be addressed, the content, sequencing, pacing and methodologies used may vary from school to school. Finally, you can see that this variation in delivery and context makes curriculum monitoring and evaluation a critical aspect of the leadership and management of a learning school.

You will have seen that effective planning and monitoring of teaching and learning at the school requires instructional leaders also to consider all the necessary supporting factors. You may find the following annual planning toolkit and guidelines developed by BRIDGE (2018) useful resources in this regard:

<https://www.bridge.org.za/wp-content/uploads/2018/03/A-Guide-to-Using-BRIDGE-Principals-Annual-Planning-Toolkit-Hyperlinked-2-1.pdf>



# Unit 3: Managing teaching and learning for school improvement

*Over the past few decades there has been an increasing understanding and appreciation that the sharing of ideas and the co-operative approach found in effective teams produces better results and greater productivity than the traditional hierarchical, individualistic and competitive organisational structures. The (perceived) value of this new approach is perhaps best summed up in the oft quoted statement “None of us is as smart as all of us”. (Clarke, 2007: 45)*

## Introduction

Unit 1 explored **why** a specific focus on teaching and learning is needed and also explored the role of instructional leaders in building a learning school. Unit 2 then identified **what** instructional leaders need to focus on in leading and managing the school curriculum. You identified the need to plan and monitor curriculum coverage, what teachers do and why, what learners do and why and what learning resources are used and why. This third unit focuses on **how** you can get teachers involved in making evidence-based decisions to improve the quality of teaching and learning.

### Unit 3 learning outcomes

By the end of this unit you should be better able to:

1. Demonstrate the personal qualities, attributes, pedagogic knowledge and professional competencies necessary for effective leadership and management of teaching and learning.
2. Demonstrate knowledge and understanding of the importance of the creation of a caring, disciplined and effective learning organisation.
3. Demonstrate an understanding of the relationship between managing teaching and learning, financial principles, the links to resource management and school development planning.
4. Demonstrate an understanding of the link between resource inputs and educational outcomes in your own school context.
5. Understand and demonstrate the integration of curriculum and staffing needs and decisions with the budgeting process.

This unit is divided into four sections as follows:

**Section 1:** Managing teaching and learning for school improvement .

**Section 2:** Monitoring classroom practices.

**Section 3:** Monitoring the work of teachers and learners.

**Section 4:** Modelling good classroom practices.

# Section 1: Managing teaching and learning for school improvement

In this unit you are building upon what you have learned in the previous two units as instructional leaders. As leaders, in whatever your sphere of influence, you need to keep in mind that the classroom climate created by the teacher has a powerful effect on how well learners learn. It is therefore necessary for school leaders to make sure that there is on-going professional and personal growth at the school with regard to classroom and school practices. This growth should promote effective learning and foster democratic values and attitudes amongst all teachers and learners as well as a shared vision for learning and teaching. As leaders you also need to consider how getting the balance right between *the school's interests* and the needs of *individuals* can make all the difference between a well-run school and a school that is out of touch with itself and its community.

You will also be introduced to key issues around the monitoring of classroom practices, classroom observation and modelling of good classroom practices. These issues will be discussed within the differing contexts of your schools. This will be done through introducing what are considered to be the main functions of the principal, in addition to providing instructional leadership: namely the management of all the school resources (human, financial, and physical). These functions of leadership will be explored in detail in *Module 4: Leading and managing people and change*, and *Module 6: Leading and managing the school as an organisation*. This builds upon these and other functions of the principal and other leaders as are detailed in the South African Standard for Principalship (SASP) (DBE, 2015). You will be asked to consider how you can maximise the effectiveness of your school in promoting, developing and maintaining quality teaching and learning whatever the school context, with regard to developing your Workplace Project (WPP) as detailed in *Module 1: Professional Portfolio and Workplace Project*.

As you have learned in the previous units, the management of teaching and learning is regarded as increasingly important for principals and other school leaders in any context. But is this easier said than done given all the demands on school leaders?

## Activity 24: Review your role as instructional leader

**Suggested time:**  
45 minutes

**Aim:**  
To deepen understanding of **your** role – to describe and understand this in YOUR context.

### What you will do:

1. You have learned in Units 1 and 2 of this module about what the role of an instructional leaders is

expected to be. Now explain what **you** consider to be the *key functions* of the principal and other school leaders, whatever their sphere of influence. Have your views changed in any way since working through the previous two units? List these *key functions* in order of importance, as **you** would rank them.

2. Is this what you have experienced, or is it what you think ought to happen? Give your reasons and explain why, in your experience, these things do happen, or why they don't.
3. Discuss with a member of your school-based community of practice (CoP). Are there similarities or differences in your responses?
4. Write your response in two or three paragraphs (each paragraph 10–12 typewritten lines in length). Keep your response in your Learning Journal. Now consider if your response agrees with the following from the SASP statement and research.

### Discussion of the activity

The SASP has set out the core purpose of principalship, and this focuses strongly on the need to lead and manage teaching and learning effectively. As the document states:

*Principals working with school management teams (SMTs), school governing bodies (SGBs), representative councils of learners (RCLs) and wider communities must effectively manage, support and promote the best quality teaching and learning, the purpose of which is to enable learners to attain the highest levels of achievement for their own good, the good of their community and the good of the country as a whole. (DBE, 2015: 5)*

The research on school improvement shows that the two main factors influencing the quality of education are classroom practices and leadership, as you learnt in Unit 1. Principals can impact on classroom teaching by adopting a proactive approach as instructional leaders. However, Bush and Heystek's (2006) research showed that South African principals often did not see their role in this way. They were often much more concerned with financial management, human resource management, and policy issues. The *management of teaching and learning* was ranked only seventh out of ten leadership activities in a survey of more than 500 Gauteng principals (Bush & Heystek, 2006: 68). Bush and Glover's (2016) research showed that there remained limited concern about teaching and learning and more interest in, and anxiety about, management functions than in leadership functions.

However, Ali and Botha's (2006) study of secondary school Heads of Department (HODs) which included Gauteng, even though earlier than Bush's study, suggested that a shift in thinking may have begun in some schools as most (79%) of their respondents refer to "monitoring the teaching and learning standards of teachers and learners' as one of their major contributions to school improvement" (Ali & Botha, 2006: 80). But, the authors did question whether the HODs were really carrying out this task, given what they observed in the schools, and the actual practices of the HODs in general. However, the researchers noted that they had observed "the responsibility of school managers has shifted towards instructional activities and the accomplishment of high quality outcomes" (Ali & Botha, 2006: 12). They also noted that, if teaching and learning are to improve significantly, "HODs will have to spend much more time in supervising the teaching and learning activities that occur daily in their subject or learning area" (Ali & Botha, 2006: 17). The authors concluded with several recommendations and some of these relate specifically to the management of teaching and learning, or what they describe as *the instructional domain*. Namely, instructional leaders should:

- Spend more time analysing learners' results;
- Jointly develop departmental improvement plans with their teachers;
- Monitor teacher classroom records on a regular basis;
- Establish direct observation of teacher teaching;
- Set improvement targets with teachers.

### Activity 25: Identifying the *instructional domain*

**Suggested time:**

45 minutes

**Aim:**

To explore the *instructional domain* in your school.

**What you will do:**

1. Do you agree or disagree with the findings shown in the five bullet points above? Think about this from your leadership experience and your response to Activity 24. Give your reasons.
2. Are these areas of the *instructional domain* key areas of importance in your school? What evidence could you produce to support your answer.
3. Are these areas currently important/key to your role as leader, whatever your sphere of influence? Explain your response.
4. Discuss the above with a member of your school-based CoP.
5. Keep your written responses in your Learning Journal.

**Discussion of the activity**

Now you can think about how school leaders can manage teaching and learning effectively, given the reality that it is teachers, not principals, who work directly with learners in the classroom. Therefore, the leaders' influence is usually indirect, but it is of critical importance in its support of the quality of teaching and learning that should take place in the classrooms and in the instructional domain of the whole school.

There are several ways in which the influence of instructional leaders may be exerted. Consider the following practices that research suggests are key to the *instructional domain* (Bush *et al.*, 2008; City *et al.*, 2010):

- Modelling – using the power of example (sometimes the principal, sometimes other leaders or teachers); demonstrating a model lesson with a colleague and sharing good practices.
- Monitoring – analysing and acting on learners' learning data, knowing what is happening in classrooms, using classroom observation to find out about, and to spread effective teaching strategies and practices; seeking to assess the ways in which teaching plans are put into effect, and the outcomes from these in terms of learner attainment.
- Dialogue – professional conversations with colleagues, setting up CoPs, and the use of formal and informal meetings; feedback, mentoring and coaching of colleagues.
- Evaluation – seeking to assess the impact of teaching and learning at a more strategic and developmental level for the school.

Research by City *et al.* (2010) shows further that their *Instructional Rounds* network indicated key points about the influence of networks and CoPs, namely:

- Teaching matters most.
- An effective theory of action connects the principal's office and the classroom.
- Systemic improvement is not *linear*. In other words it may follow irregular paths and processes, not movements in a straight line.
- Solutions must be adapted to local contexts.
- Modelling alone is not sufficient; accountability counts.
- CoPs accelerate learning.
- Districts need to continuously measure progress – external assistance is helpful.

### Activity 26: Considering seven key practices in the *instructional domain*

**Suggested time:**

45 minutes

**Aim:**

To deepen your understanding of these seven practices in your school.

**What you will do:**

1. What are your views on the above practices and key findings from the research by City *et al.* (2010)? How would you list these findings in order of importance; and why? Explain why you think these are important and why school context is critical in determining how and what is done in improving and supporting classroom practice.
2. How involved is your district/circuit in monitoring and measuring progress? Whatever your response, what are the implications for the school of this involvement or non-involvement?
3. Discuss your responses with a member of your school-based CoP.
4. Keep your response in your Learning Journal.

**Discussion of the activity**

The understanding of context has been repeatedly emphasised in this module as it is critical to making informed decisions. Some schools will need more external support than others in making improvements, but all schools need to understand what is happening in their own classrooms.



## Section 2: Monitoring classroom practices

You can now consider some other views on a key aspect for instructional leadership practices. Southworth (2004) says that monitoring includes analysing and acting on learners' progress and outcome data – for example, assessment and test scores. He says that, "Leadership is stronger when it is informed by data on students' learning, progress and achievements as well as by direct knowledge of teaching practices and classroom dynamics" (Southworth, 2004: 79). He adds that monitoring involves visiting classrooms, observing teachers at work and providing them with feedback. The English Office for Standards in Education (OFSTED, 2003) in Britain found that there was a very strong link between good monitoring and good teaching. Southworth (2004: 80) adds that "monitoring classrooms is now an accepted part of leadership." He concludes that monitoring is a widely distributed role, including head teachers, deputies and heads of department. But is this the general case in South African schools, in practice, in your experience?

### Activity 27: Identifying assessment practices

**Suggested time:**

1 hour

**Aim:**

To engage with assessment practices in your school.

**What you will do:**

1. What assessment practices are carried out in your school? How are these practices monitored and by whom? Describe the processes and the rationale that is in place for monitoring learners and their work? What happens as a result of the monitoring? Explain what happens in detail?
2. If monitoring of assessment practices is not carried out, either in part or as a whole school activity, then explain why this is and what could be done to remedy it. Remember that you should be as honest and as open as you can be in your responses – only in this way can you develop the strengths and minimise the weaknesses of your school context.
3. Discuss your responses with a colleague in your school CoP and keep your response in your Learning Journal.
4. Now consider the following objectives of assessment of learning from Hargreaves' (2005) research. Did your responses agree or disagree with these?

Hargreaves (2005) deals with assessment of learning as an aspect of monitoring in the classroom. He sets out six possible objectives:

1. Measuring learners' attainment against stated targets or objectives.
2. Using assessment to inform the next steps in teaching and learning planning.
3. As a basis of feedback for improvement to both teachers and learners.

4. As evidence for teachers to learn about learners' learning.
5. As a basis for learners to take some control over their own learning.
6. As an opportunity to turn assessment into a learning event.

### Discussion of the activity

Hargreaves' (2005) objectives indicate the need to establish a process for effective monitoring. This also accords with Leithwood *et al.*'s (2006) suggestion that instructional leaders should build on a combination of system results (internal test results and district or national examination results), and consistent learner assessment practices. These should lead to *longitudinal* [long term] monitoring as learners and classes move further up the school.

In the USA, the North West Regional Education Laboratory (2001) provided a summary of monitoring practices. It argued that practitioners at district and school level should collect and summarise information about learner performance on a regular basis, identify areas of strength and weakness and relate these to the goals and objectives of their schools. This would enable the co-ordination of assessment to ensure quality, avoid duplication of effort and minimise disruption to classroom instruction. It would then use these assessment results to evaluate programmes and target areas for improvement. In this way it would provide direct support for classroom-level assessment efforts.

Bush *et al.* (2008) say that monitoring is an on-going process, undertaken to establish whether teaching and learning are taking place in a satisfactory way. They report that, in their Limpopo and Mpumalanga research, HODs in all eight schools examined teachers' portfolios and workbooks and also checked learners' work to see if teachers' claims about their assessment and monitoring practices were matched by learner outcomes.

Principals, in turn, reviewed HODs' work and also checked learners' work directly. However, most of these schools did not have a programme of classroom observation. Monitoring also appeared to be undertaken largely to fulfil provincial Department of Education expectations rather than to promote improvement in classroom practices. One exception was a principal who instigated disciplinary action against a HOD who failed to monitor his teachers effectively, resulting in very low matric scores.

It may be useful to pause a moment and think about the above issues in relation to your own school.

- Does classroom observation happen at your school? If so, how often and for what reasons?
- If classroom observation happens, how is feedback used to enhance professional commitment and to encourage further professional development?
- Has in-school monitoring ever resulted in any kind of disciplinary action being taken? If yes, what action was taken and what impact did it have?

Ultimately, you need to judge the impact of your instructional leadership by what learners actually achieve.

## Evaluating learner outcomes

In the evaluation process for schools, and within the leadership *instructional domain*, there has been increasing emphasis on benchmarking, where the progress made within a school is compared with that achieved in similar schools (Glover & Levačić, 2007). This was also the approach within South Africa's National Policy on Whole-School Evaluation (DOE, 2001). The supervisors were to use agreed national

criteria so that the conclusions they reached about one school could be compared with the conclusions reached about another, no matter where it was in the country. In practice, however, some provinces use simple assessment data to *label* schools as under-performing regardless of contextual variables, and percentage pass benchmarks are often applied as a standard setting.

### Activity 28: How benchmarks are used

**Suggested time:**

1 hour

**Aim:**

To engage with the use of benchmarks and how this applies in your school.

**What you will do:**

1. Do you know whether your province uses a benchmark for performance based on matriculation passes? If yes, what is it? If no, try and find out. Do you think that matriculation pass rates are the best method for determining a school's performance? How can benchmarking be done in primary schools if matriculation pass rates are the only benchmark taken into account? You might like to discuss this with a member of your school-based CoP. Keep your response in your Learning Journal.
2. Now, read the article by Nic Spaul (Sunday Times, 14 January 2018) which can be accessed by clicking the following link:  
<https://nicspaul.com/2018/01/14/my-sunday-times-article-on-matric-2017/>
  - a. What is your immediate reaction to what Spaul says here? Did you realise that the *real* matric pass rate is as poor as it is? Do you agree with him or not that "as a country ... we need to take active steps to de-emphasise the matric results and instead focus on the ailing school system"? (Spaul, 2018.)
  - b. Write a well-structured response of approximately six paragraphs (each to be 10–12 typewritten lines in length) to support or contest Spaul's views on *The real matric pass rate and the real site of failure in education*. Your total number of words should be between 800–1000.
  - c. In providing your reasoned argument through evidence to support your views, you should also reflect upon your experience as a primary or a secondary school teacher, showing how this influences your views on his argument.
  - d. Keep this response in your Learning Journal.

**Discussion of the activity**

As you have learned, this module has emphasised that the *context* of schools significantly affects the learner outcomes for many reasons, both positive and negative. This also applies in the former Model C (Section 21) schools in the more affluent suburbs around South Africa but which now often service wider and more varied communities than in the past. These factors impact upon their resources and on the ways in which these wider communities can be involved in the school's activities, given logistical issues of communication and

travel (Prew, 2009). It also applies to the township and rural areas where disadvantage and multiple deprivations often impact negatively on outcomes (Bloch, 2009; Faulkner, 2015; Maringe & Moletsane, 2015; Mbokazi, 2015).

So, you have seen that one form of benchmarking involves comparing the school with other similar schools. Another form of benchmarking involves comparing schools own performance at different times, a process that has come to be called *within-school variation*.

## Within-school variation

Reynolds (2007) has developed a system for consideration of progress within a single school – comparing the progress of one group against the average for the school as a whole. This is called *within-school variation* (WSV). The advantage of this approach is that the context is the same so that differences can be readily attributed to in-school variables. In one South African secondary school examined by Bush *et al.* (2008), for example, the 2007 matric score averaged 52% but subject scores varied from 13% in Maths to 85% in English.

So you can see that comparing school performance, and learner outcomes, between schools in vastly different contexts is difficult. What methods can be used and justified given the wide variety of contextual factors involved? How much allowance should be made for the impact of poverty, ill-health and hunger, for example, on the performance of learners? Therefore, you could say that if you evaluate and compare results within a single school, then this is straightforward and much more meaningful. If the same group of learners perform well in one learning area and badly in another, this must be due to internal factors, not the external context. However, whatever the importance of, and need for, this internal evaluation, the reality in your school context may make this difficult and judgements on external or internal factors more problematic to determine, analyse and act upon.

### Activity 29: Formative assignment: force field analysis to determine within-school

**Suggested time:**

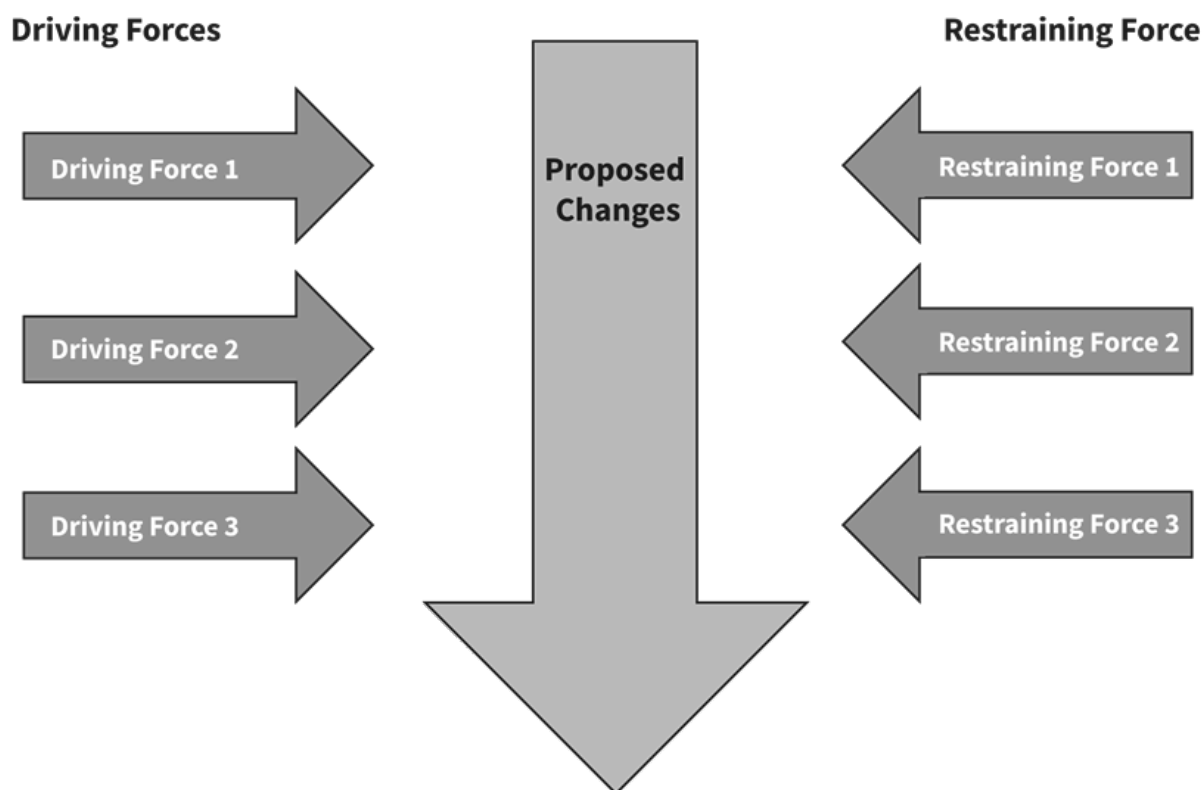
2 hours

**Aim:**

To engage with WSV and means of identifying these in your school.

**What you will do:**

1. What factors in your school would *enable* or *hinder* a WSV evaluation? What action plan would you put in place to move this evaluation process forward – and why would such an action plan be important?
2. To help you in this task, you might want to use a *force field* analysis diagram to help you identify the *enablers* and the *barriers*. A force field analysis identifies those factors that drive or support change and those factors which restrain or work against change as in the following example.



**Figure 8: Example of a force field analysis diagram**

(Source: <https://www.edrawsoft.com/force-field-analysis-examples.php> )

1. You can then create a written analysis of your findings. Using a force field analysis diagram helps you to achieve successful change and improvement. The diagram provides a basis for you to identify and manage the various forces, influences and situations that are working for and against development and monitoring initiatives in your school. This analysis can be based on the Kurt Lewin force field model accessed at: <http://www.change-management-coach.com/force-field-analysis.html> (Change Management Coach, 2017).
2. You can work with a colleague in your school CoP to discuss these factors, but you must keep your own individual analysis and written response as it could form part of your WWP development.

Figure 8 was sourced from Edraw who also provide a summary of advantages and disadvantages of conducting a force field analysis at:

<https://www.edrawsoft.com/force-field-analysis-advantages-and-disadvantages.php>

### Discussion of the activity

It may be that you have found several barriers in your context that accord with Reynolds' (2007) research. His research identifies several *historical barriers* in dealing with WSV. Some of these factors are applied to the South African school mentioned by Bush et al. (2008) above, see Table 8 below.

**Table 8: Applying within-school variation to a South African secondary school**

Historical barriers in dealing with WSV (Reynolds, 2007)	EXAMPLE: Factors influencing WSV in one secondary school (Bush et al., 2008)
Weak school management that fails to confront the issue.	The principal says that the mathematics HOD is lazy and he is now subject to a verbal warning. The HOD adopts a <i>blame the learner</i> approach and also criticises the primary schools.
False modesty (a deliberate attempt to downplay own achievements) on the part of effective teachers/departments.	The languages HOD is modest about his achievements.
The difficulty of separating personal reasons for effective practice from the methods that are being used. For example, a teacher may realise that an open-ended project assignment would be the most appropriate method but then chooses not to use this method because they are not confident enough in the subject matter to assess the variety of responses that might arise.	Both HODs claim to use classroom observation but the HOD who teaches languages is able to provide more information because he uses this approach more consistently and more effectively.
The difficulty of getting departments to see any usefulness in swapping practice when there are different subject cultures.	The school operates a <i>silo</i> model with each department using a different observation instrument.

(Source: Adapted from Reynolds, 2007)

### Activity 30: Analysing year-end examination results for within-school variations

**Suggested time:**

1 hour

**Aim:**

To deepen your understanding of WSV in your school through analysis of examination results.

**What you will do:**

1. Analyse your school's year-end examination results to assess WSV. For Foundation Phase comparisons, you will need to look at your records on learner achievement in literacy, numeracy and life skills and whether there are variations between performances in the three key areas as well as between classes.
2. Using Table 9, explain the reasons for such variations. You should attempt a frank and honest answer to this question. Try to avoid focusing too strongly on *learner attitudes*. The same learners are involved in all, or most, subjects, so variable learner attitudes are likely to be a response to teacher or school variables. If a learner exhibits a negative attitude to a particular subject or classroom, then the focus should be on how to change that attitude rather to accept it as a given. A recent study by Cheung (2011) on evaluating student attitudes toward Chemistry lessons provides a useful set of models and

approaches. If you identify a problem area, consider how you are going to address it.

**Table 9: Applying within-school variation to your own school**

Reasons	Major factor	Minor factor	Not applicable
Differences in the quality or commitment of HODs			
Differences in the quality or commitment of teachers			
General attitude of learners			
Grade progression criteria			
Knowledge <i>gaps</i> at school entry			
Other (please state)			

### Discussion of the activity

There is no one answer or right answer as identification and action will depend on your context. However, Reynolds (2007: 18) stresses that there should be a clear focus on teaching and learning to reduce within-school variation. This requires:

- The development of high-quality observational systems.
- Attempting to specify the desired core classroom-related teacher behaviours.
- Encouraging discussion of teaching in departments and across the school.
- Attempting greater consistency in teaching behaviours and especially in the expectations of learners, within and across departments.

As the first bullet point above suggests, effective monitoring and evaluation require classroom observation.

## Observation

This section considers how observation may be used for teacher development, or as a tool for teacher assessment or performance management. But first it might be useful to pause and think about your own experience in this regard: what are your experiences of observation in your classroom, or as the observer of a classroom teacher's lesson?

### Activity 31: Observation – explore why and how

**Suggested time:**  
30 minutes

**Aim:**  
To deepen understanding of observation practices in your school.

#### What you will do:

1. Discuss this activity with a member of your school-based CoP.
2. Each of you should describe your experiences of observation and in your response give an explanation of **if** and **how** this works within your school both as policy and practice.
3. Is it part of school development and of teacher professional development as a regular and accepted practice?
4. Is there a gap between what is meant to happen (your school policy) and what actually happens, or doesn't happen (your school practice)? Why? You should give a frank and honest response to the relationship between policy and practice in your school as you explore what positive and negative factors there are to this in your experience.
5. Keep your response in your Learning Journal.

#### Discussion of the activity

The use of observation in school classrooms is a key factor in working towards school continuous improvement. If you are striving for excellence in your school, whatever the context, then observing what actually happens is key to this, and not just in classrooms but in the whole school and all its activities. This includes extra-curricular and co-curricular activities, which you will learn more about in *Module 3: Leading and managing extra- and co-curricular activities*. Leaders, whatever their sphere of influence, need to know that what they **think is** happening **is** actually happening. Establishing observation processes both formally *and in practice* within the school are therefore essential. If setting up these processes is a problem because, perhaps some teachers do not like to be observed, or if the teacher unions object, it is the school principal's duty to ensure this happens (DBE: 2015). But it is what the observations are used for that is key to their successful implementation, and to getting support for them from classroom practitioners. It may well be that if teachers have experiences of observation that are supportive rather than judgemental, that they will begin to drive the process themselves. See the following link for a short discussion by Kaufman and Grimm (2013) on this: <https://www.middleweb.com/7865/teacher-driven-observation/>.

Given the negative history and association with judgmental inspection processes in the past, agreement needs to be reached between stakeholders on what observation data should be used to provide a *measurable* and yet *realistic* view of what is happening in the school and the classroom. You need to refer to agreements reached through the Education Labour Relations Council (ELRC) and to emphasise the supportive and developmental purpose of monitoring and appraisal in the Integrated Quality Management System (IQMS) process.

As an instructional leader you need to be willing to open your own classroom practices for review, which is



partly why you went through such a critically reflective process in Section 2 of Unit 2. One gentle way into such a practice is to deliberately plan a number of classroom interventions in which you and the teachers whom you support, co-plan and co-teach in response to addressing a particular shared curriculum challenge. Having built a relationship of trust in this way, it may then become more acceptable to teachers to have others observe them teaching and to offer constructive feedback.

To help you explore more of the uses of observation to improve learner outcomes and teacher development, you can look at what O’Sullivan (2004) has to say about observation. She emphasises that educational quality can only be improved if there is *systematic* observation of what is happening in the classroom. This involves recording, analysing and reflecting on relationships, interactions and outcomes on a regular basis. Observation provides understandings and insights that are critical to assessing and improving quality of teaching and learning interactions (O’Sullivan, 2004: 253–254). She also argues that lesson observation can answer the *what*, *how* and *why* questions. These are: *What* is the current state of educational quality in the school? *How* can it be improved, realistically, with the available resources? *Why* is the quality of education poor (if relevant)? *How* can it be improved, realistically, with the available resources?

However, she makes clear that the *why* questions have to be supported with more than just examination or learner test results. In order to fully understand the teaching and learning processes currently being used and the extent to which particular processes are likely to be implemented, teacher interview data is essential. This supports the need for dialogue with teachers and HODs, mentioned above, and emphasises the importance of establishing CoPs for this dialogue, formal and informal, to take place regularly.

A *teacher development focus* targets the improvement of teaching and learning, while a *performance management approach* is more about seeking to *weed out* or *get rid* of weak or non-performing teachers. O’Sullivan (2004) stresses the importance of allowing for context in making judgements about the quality of teaching and learning. The IQMS in South Africa may be seen as an example of a performance management approach (De Clercq, 2008) but you would need a clear focus on *teacher development* when implementing an observation programme in your school. The starting point should be a shared interest in raising standards of teaching, for the benefit of learners. A staff and school development plan that enshrines shared values and vision will help to ensure this. In other words, it is better to work towards strengthening *all* your teachers than finding ways to get rid of *weak* ones. You will learn more about this aspect in *Module 4: Leading and managing people and change*.

With regard to staff development, from her research in Namibia, O’Sullivan (2004) reports on the use of observation to assess teacher development noting there was often a difference between what teachers reported and what was observed in practice.

### Activity 32: The purpose of observation in context

**Suggested time:**

30 minutes

**Aim:**

To deepen your understanding of the complexities of observation and adapting observation processes to own school context.

**What you will do:**

1. In your experience, are O’Sullivan’s research findings in the paragraph above, familiar to you, in any of the contexts in which you work or have worked?
2. Why do you think there is a difference between what the teachers say they do, and what the observation reveals? Would this be the same in your school? And how would you know this – where is your evidence?
3. Discuss these issues with a colleague in your school CoP and keep your response in your Learning Journal.

Remember that your WPP development will probably require you to interview and to observe colleagues when evaluating the teaching and learning that actually takes place in the school. Therefore, your response to point 3 will hopefully provide some guidelines for your own practice later.

O’Sullivan (2004) adds that teachers did not feel sufficiently empowered to determine their own training needs. Lesson observation addressed this gap. A lesson observation form was used to guide the collection of data. The researcher completed it as she observed lessons. It sought to access details about resources, state of classrooms, learner interest, motivation and participation in lessons, the actual lesson, and teachers’ standard of basic teaching and classroom management skills. A quantitative analysis of the completed 87 lesson observation forms indicated, for example, very poor resources and working conditions, low learner participation, no group work or pair work, and poor basic teaching skills, such as asking questions, lesson preparation, use of chalkboard, classroom management and appropriateness of content (O’Sullivan, 2004: 12–13).

**Discussion of the activity**

As mentioned earlier, leaders need to be very aware of how to balance the needs of the individual teachers and learners with the needs of the school, and observation can help to achieve this balance. And only with complete data [information] on what actually happens in the teaching and learning process can school leaders begin to improve and establish quality teaching and learning through developmental processes for the benefit of both teachers and learners. In this regard O’ Sullivan’s research provides a useful introduction to the next activity, using a case study from a rural South African context. Think about your own school context and staff empowerment regarding their development needs.

**Case Study: Secondary School A**

The school has about 900 learners from Grade 8 to Grade 12. It is located in a poor part of a township, adjacent to a small town. Learners are often hungry. There is extensive unemployment in the township and there are many child-headed households. There are also problems of high teenage pregnancy rates, and many health and social problems in this area of multiple deprivation.

Despite these problems, standards have been high but the matric results have declined over the past two years to 52% and the school is now regarded as *under-performing* by the provincial Department of Education.

The school leaders monitor teaching and learning in two ways. Firstly, HODs moderate teachers' workbooks, learners' class work and assessment tasks. According to the languages HOD, this is done to see "whether class work has been completed in accordance with the learning programme". Secondly, the school has introduced an observation programme as part of its Improvement Plan. The principal explains the purpose of observation in the following way:

*Observation is used to detect whether the lesson is progressing properly and reaching the learners. Observation is to help the teacher and make sure there is effective teaching and learning. We do observation to see what is happening. It is for both monitoring and development. Observation takes place once a term.*

One teacher notes that the HOD provides both verbal and written feedback. He says, "The feedback makes me a better teacher."

HODs are free to develop their own observation instruments, linked to the specific needs of their learning areas. The instrument developed by the languages HOD is quite simple (see Table 10).

**Table 10: Classroom observation instrument for languages: Secondary School A**

Criterion	Yes	No
1. Is the lesson well prepared?		
2. Are learners actively involved in their learning?		
3. Are learners assessed continuously?		
4. Can the teacher create a positive learning environment?		
5. Evidence of the knowledge of the curriculum and learning programmes.		
<b>Recommendations</b>		

### Activity 33: Evaluating an observation instrument

**Suggested time:**

1 hour

**Aim:**

To deepen your understanding of what an observation instrument might be in your school.

**What you will do:**

Examine the observation instrument developed for Secondary School A and answer the following questions based on your experience and your context:

1. Is the HOD asking appropriate questions? What would you change?
2. Is a simple yes/no grading appropriate? How would you adapt this approach?
3. Is this instrument likely to be helpful in improving teacher practice in your context?
4. Discuss your ideas with a colleague in your school CoP, compare your responses and keep your response in your Learning Journal.

**Discussion of the activity**

The questions cover some important topics but you might want to add questions about subject knowledge, learner discipline and classroom displays. The yes/no grading is simple to use but lacks precision. How do you respond if some aspects of lesson preparation are good and some are inadequate? In improving teacher practices, the key element is likely to be the *recommendations*, which could provide the constructive feedback required to generate improvement.

## Developing observation skills

Observation is an everyday activity. In their professional and personal lives, people notice what is happening around them and make mental notes about what they see, and the judgements they make from this.

City *et al.* (2010) whose work was introduced in Unit 1, make some very *pertinent* remarks from their research regarding what you see and how you judge what you see in a professional context, in school classrooms. They call this *learning to see, unlearning to judge*.

*Teachers tend not to be very good at observing classrooms. And why should they be? Teachers usually have very limited experience of observing classrooms since the bulk of their time is spent in their own classrooms, teaching... The kind of observation we are talking about here focuses not on teachers themselves but on the teaching, learning and content of the instructional core. What is the task that students are working on? In what specific ways are the teacher and students interacting in relation to the task? What is the evidence of what you see? (City et al., 2010: 84).*

In your context think how this applies in South African schools. Remember that City *et al.* are talking about observation of the nature of the teaching and learning, *the instructional core*, which is taking place, not about the specific observation of the teacher for evaluation purposes of that individual. But is it that easy to separate these two areas, and how easy is it to observe the teaching process, the content being taught and the learners' responses and not judge the teacher personally? You should reflect on this from your experience in your context as you move to look at the processes that underpin observation.

What you can be certain of however, is that to conduct observation for these professional purposes, i.e. to assess teaching and learning, requires a systematic approach. Building on City *et al.*'s (2010) work, you know that the first decision for the observer is to be clear about the purpose(s) of the observation. If it is being used as a monitoring tool, it may have the following purposes:

1. To establish whether the teacher is well prepared for the lesson.
2. To assess whether there is appropriate classroom control.
3. To assess the learning environment.
4. To establish whether the teacher has sound subject knowledge.
5. To assess the extent to which learners are able to interact with the teacher.
6. To assess whether and how the teacher assesses learner comprehension, for example, through appropriate questioning techniques.

Can you think of other purposes that are specific to your context?

As part of the process, the observer will definitely need to decide what role they are fulfilling when observing. They may be a *participant observer*, taking part in the lesson, or a *non-participant observer*, watching without taking part. If they are monitoring the teacher, then it is more likely that they will be a non-participant and will need to be positioned in the classroom as unobtrusively as possible. If their presence changes the lesson in a significant way, which other persons in a classroom can do, then what they are observing will not be a reliable indicator of classroom practices. Of course, if having other teachers in the classroom becomes a regular practice within the school, it should become easier to observe without being obtrusive. Another way to achieve this is to make videos of lessons and then to discuss these after the event. Or, perhaps, better still, to adopt the *lesson study* approach common in elementary schools in Japan (Teacher Development

Trust, 2015) where teachers regularly work in teams to plan, mediate, co-observe and co-critique (see <https://tdtrust.org/what-is-lesson-study>). Essential to gaining value from any of these approaches is the way in which feedback is mediated. Each teacher is an individual and each observer is an individual. As indicated in Figure 3 in this module, both the observer and the observed are more likely to gain from the experience if they have a conversation in which each participant respects and seeks to learn from the other.

There will be a need to decide whether observation should be scheduled or unscheduled. A scheduled observation is agreed in advance with the teacher for a specific time and with a particular grade. It is a professional courtesy to make such arrangements in advance but it may lead to the teacher preparing more thoroughly than usual in order to put on a *show* for your benefit. Unscheduled observations may be unwelcome, or obstructed, but may also allow the observer to see whether the teacher's *normal* lessons are of an appropriate quality.

Systematic observation requires a formal recording process. This is likely to involve an instrument such as the one used by Secondary School A. To provide for comparisons across classrooms and learning areas, a common observation schedule could be designed and agreed through consultation with the School Management Team (SMT) and with teachers. Learners might also be consulted on the teacher practices which they find helpful and supportive. And then there is the need to consider how feedback will be given to the teacher. This may be in person or in writing, or both. There is a consensus of opinion that an oral approach is more personal and can be done soon after the lesson. But constructive and positive feedback, whether oral and/or written, is key to the success of the process, and its purpose, as shown here, is to have an impact on the *instructional core* through improved teaching and learning.

### Activity 34: Develop an observation instrument

**Suggested time:**

2 hours

**Aim:**

To develop an appropriate observation instrument for your school.

**What you will do:**

1. Prepare an observation instrument for use in your school. You could discuss your ideas with a colleague, and at a meeting of the SMT, and ask for suggestions to improve it. When you have a framework that everyone is satisfied with, try and conduct observations of two different teachers. Of course, you must first get their agreement to be observed. You could then provide them with constructive feedback to develop and improve their teaching. It is important to base this feedback *only* on the evidence you have gathered from the observation, nothing else.
2. If your school already has an observation instrument, then consider if this is fit for purpose as you have learned here. How could it be improved in order to meet City *et al.*'s (2010) criteria on best practices for improving the *instructional core*? Refer back to Figures 2 and 6 in this module.
3. Keep this instrument and your responses to the activity in your Learning Journal.

**Discussion of the activity**

There are different ways in which the observation instrument in the above task could have been developed so there is no *right* instrument nor is there a *wrong* instrument. The purpose of the task is to help you to develop your ability to develop an observation instrument and your observation skills. You might include the instrument plus anonymous copies of your observation records and feedback in your WPP if applicable.





## Section 3: Monitoring the work of teachers and learners

Classroom observation is one important aspect of monitoring but there are other strategies available to school leaders. A key area is the monitoring and scrutiny of the *written* work of teachers and learners.

There are three main aspects to consider when monitoring teachers' documents:

1. *How* has the teacher prepared for each lesson?
2. *How*, if at all, has the teacher recorded the outcomes of the lesson?
3. *How*, if at all, does the teacher record the outcomes of learner assessment, including class work and homework?

### Activity 35: Monitoring in practice

**Suggested time:**

1 hour

**Aim:**

To reflect on your school monitoring practices.

**What you will do:**

1. Consider the importance and usefulness of monitoring written work in your school. Give reasons for your response outlining the *what*, *why* and *how* of this practice.
2. If there are positive factors that make this practice both useful and well applied in your school, identify these and explain the *what* and *the how* of this. However, if there are factors that might make this monitoring problematic in your school, explain what these are, and how these could be overcome.
3. You should devise a template for use by all teachers and leaders in the school, so that a consistent approach to monitoring is in place. This might take time as you get agreement on what this template should look like but it will be a very useful template to have.
4. Keep your final template as a record in your Professional Portfolio. You may also find it useful for your WPP. You might also like to comment on the process of developing the template.

### Discussion of the activity

Monitoring needs to go beyond simply checking that things like lesson plans have been done to consider how leaders' responses could help teachers to improve their practices. In responding to teachers, leaders should always begin with positive points before making suggestions for improvement. Responses should be recorded in the teacher's file. Combining scrutiny of documents with classroom observation provides strong evidence about how well teachers are performing. This is known by researchers as *triangulation*, which means examining the same issue in two or three different ways to gather evidence that is credible or *believable*, valid and useful.

You will now consider the following four case studies from Bush *et al.*'s (2008) research.

They reported that principals or heads of department (HODs) at most of their eight South African case study schools conducted some form of scrutiny of teachers' written work. This usually comprised reading their portfolios and/or work books. A sample of **four** of the eight schools were chosen to illustrate the diversity of approaches across the sample.

**At School B**, for example, the HODs moderated teachers' workbooks, learners' class work and assessment tasks. According to the languages HOD, this was done to see "whether class work has been completed in accordance with the learning programme".

**At School D**, the principal had a strong personal involvement. She examined and controlled teachers' preparation files and portfolios and controls the learners' books to ascertain that what was in the teachers' portfolio corresponded with what is in the learners' books, and to ensure that all the work prescribed for the term had been covered.

**At School F**, monitoring was highly structured and comprises four levels:

- At classroom level, teachers monitored learners' class work and assessment tasks. Individual progress was monitored and individual feedback was provided.
- At departmental/subject level, HODs and subject heads monitored teachers' planning and preparation, and moderated tests and examination papers before *and* after they were written. Results were analysed and discussed per grade and subject during weekly meetings.
- At SMT level, HODs provided feedback on their respective subjects, and performance per subject and grade. Individual learners were discussed when problems were identified.
- At school level, feedback was given to the academic committee of the school governing body (SGB) once per term as a standing item on the agenda.

**At School G**, the principal could not provide a response to a question about how learner achievement was monitored.

**Activity 36: Relate case studies to own school context****Suggested time:**

1 hour

**Aim:**

To reflect on your own school context and the practices for monitoring the work of teachers and learners.

**What you will do:**

1. Do you have monitoring processes? Are these in policy **and** in practice?
2. Which of the schools in the case study do your school's monitoring processes match most closely, if at all? In what ways are they similar or different and why might this be the case? Explain fully.
3. If you had to try to introduce in your school, monitoring practices such as those at School F, what changes might you make to your current practices? How difficult would it be for you to make these changes? Would there be resistance or cooperation from your colleagues?
4. Keep your responses to the activity in your Learning Journal.

**Discussion of the activity**

There is no one right response to this activity. Its purpose is to encourage you to reflect on your school's monitoring and to see whether reading this section of the module, and learning of the practices at School F in particular, has made you think about modifying your own monitoring plans, or indeed introducing this. The main point here is that, however schools chose to do it, monitoring is an essential activity for leaders and managers of teaching and learning.



## Section 4: Modelling good classroom practices

It was noted earlier that *modelling* is an important strategy for leaders wishing to raise standards of teaching and learning in their schools. This approach is based on the assumption that principals, deputy principals and HODs are also experienced and successful teachers. As part of their role, these leaders need to consider whether, and how, to use modelling. There are two possible approaches to agreeing on a mutual observation strategy with a teacher. The first is that the observation of the teacher's work could start with the teacher observing the HOD's lesson and then be followed by the HOD observing the teacher's lesson. This could result in a discussion about the two lessons, linked to the HOD's feedback on the teacher's work. The key point here is that there should be mutual learning, with the strengths and limitations of both lessons being discussed. The second approach involves the HOD presenting a *model lesson* for teachers, particularly those new to the school, or those teaching new subjects or the same subject in a different grade. This would help to clarify the HOD's expectations.

You might find it useful to view this YouTube video: *Mr Potsane teaches maths in a South African township school*: <https://www.youtube.com/watch?v=JmMcd62eyPc> (Duration: 10.50). In the video, the teacher, Mr Potsane, teaches the concept of percentages to Grade 9 learners in a ThabaNchu school. This narrated edit of his lesson demonstrates his good time and classroom management skills and how he promotes active learning, despite the largely unfavourable contextual conditions. Take a moment to consider whether modelling occurs in your school. How does it happen and why?

Southworth (2004: 78) claims that "modelling is all about the power of example". Successful leaders are aware that they must set an example and use their actions to show how colleagues should behave. The concept of the *role model* underpins this approach. "Learning-centred leaders are role models to others because they are interested in learning, teaching and classrooms" and teachers expect leaders to be able to "walk the talk" (Southworth, 2004: 78–79). School principals sometimes lack the confidence to model their teaching but you are likely to gain the respect of your teachers if you show that you are a good teacher as well as an effective leader.

Reynolds (2007) provides an example of modelling strategies for supporting an inexperienced teacher in dealing with challenging behaviour. A recent inspection of a large, inner-city primary school in England raised behaviour management as a key issue in one of the Grade 6 classes. The school addressed the issue of the challenging behaviour of learners by developing a range of strategies based on a positive approach to discipline. This resulted in greatly improved behaviour in the classroom, which has also had a positive impact on teaching and learning. The issue has been addressed through a number of overlapping strategies (adapted from Reynolds, 2007: 3):

- Modelling, monitoring and dialogue overlap and take place simultaneously.
- Opportunities to observe colleagues create structured support, constructive feedback and the identification of professional learning needs.
- Effective modelling, monitoring and dialogue are given enough time to be effective. This means that professional development by the head teacher and leadership team are given high priority.
- Modelling, through classroom observation is consistent and at frequent and regular intervals. It is also supported by someone who has expertise and/or good subject knowledge.

While monitoring and evaluation provide a means of judging the quality of classroom practice, any subsequent improvement depends on the quality of feedback to teachers and on their receptiveness to advice. In contrast, modelling provides the potential for demonstrating good practices and generalising it throughout the school. It arises from establishing what good practices are, understanding how to encourage good practices, and then developing these through mentoring, coaching and other self-development approaches.

Lataille-Demore (2007) provides an example of modelling in her research on the introduction of multi-grade teaching into small schools within Ontario, Canada. She contends that good practices have to be acknowledged and then matched or copied by others willing and able to learn. Explicit instruction is done in three consecutive stages: *Modelling*; *Guided practice*, and *Independent practice*.

This provides a possible model for professional development of teachers in any South African school. The HOD could first give a demonstration lesson for the class, then work with the teacher through team-teaching or *participant observation*, before shifting to a non-participant observer role and leaving the teacher to resume control of the class. Subsequent observations will enable the instructional leader to assess the teacher's progress.

In respect of this modelling process in schools, the Advanced Skills Teachers (ASTs) grade was introduced in England in 1998 to reward good classroom practitioners. This was to open a career path for those who want to stay in the classroom rather than moving into school leadership and management on a promotional ladder. Its overriding intention was to shift the school improvement agenda from school level to the classroom. ASTs develop and then model good practices within their own school and within associated schools. These teachers were considered to be able to demonstrate high-level skills in teaching, classroom management and curriculum planning. They also needed to have very good subject knowledge and to understand quality planning, pedagogic practices and evaluation. Their responsibilities varied but included helping teachers with planning, demonstrating teaching and collaborating on curriculum projects (Taylor & Jennings, 2004).

There is very little published work on the use of modelling in South African schools. In one combined school studied by Bush *et al.* (2008), the principal claims to "lead by example" but he was referring to his own teaching role rather than modelling or demonstrating good classroom practices to his colleagues. One area in which modelling might be effective, and teachers open to learning, is in the use of new technology in the classroom. The introduction of new technologies, such as tablets or interactive whiteboards, represents an opportunity for *everybody* to learn something new together.

### Activity 37: Modelling lessons and developing good practices including the use of ICTs

**Suggested time:**

1.5 hours

**Aim:**

To deepen your understanding of how modelling can be used to support technology enhanced learning.

**What you will do:**

1. Can you think of any examples from your own experiences, past and current, where modelling helped to develop good practices in the classroom? Who did the modelling? How effective were they? If you can't think of any examples, then how effective do you think modelling could be in developing good teaching and learning practices in the classroom?
2. How significant is *context* in the use of modelling? Can good practices be transferred in all circumstances? Give your views.
3. Give an example of a model that YOU would use with a newly appointed, or newly qualified teacher to your school.
4. How important is it, do you think, to use the methods and approaches of a newly qualified teacher? Should the school value these fresh insights in managing change for quality learning –and is this the case in your context?
5. You should also consider whether this might apply particularly to the use of digital and information communication technology (ICT), which newly-qualified teachers might want to use in their classrooms. It is likely that they will be more comfortable and confident in using ICT as part of new classroom practices than other members of staff. They may also be very willing to share and model these practices, and the lessons from these, with other colleagues.
6. Is digital and Information communication technology used in your school as part of classroom practices, not just as a separate curriculum subject? Explain why or why not – as your context could impact on whether this is possible. Might this be because of financial constraints and/or logistical issue of communication possibilities? How might these be resolved?
7. Discuss the above issues with a member of your school-based CoP. Keep your written responses in your Learning Journal.

**Discussion of the activity**

You might find it helpful to view the following YouTube video of a South African schools' initiative: *South Africa's public schools go digital*: <https://www.youtube.com/watch?v=ujRkW574SYE> (Duration: 2.53). As part of the Smart Schools project, 88 000 tablets were distributed to learners in Gauteng public schools.

### Dialogue and feedback

There is a strong sense from much educational research that classroom practice can improve where leaders and teachers regularly engage in dialogue with colleagues (Bush, 2013a; City *et al.*, 2010). This idea was

introduced in Unit 1 as part of the importance of establishing CoPs. Where dialogue, formal and informal, is related very closely to observation and modelling practices as an integral part of professional development, then teaching and learning improvements are more likely to happen, and learner outcomes will hopefully improve.

Regular dialogue needs to take place at two main levels in schools:

- Between the principal and the school management team.
- Between heads of departments and phase/grade heads.

You know from your experiences and from the research literature that team work can be a powerful means of enhancing teaching and learning but it needs to be seen as a normal part of professional life.

Through sharing experiences, both problems and solutions emerge, which can lead to enhanced learning outcomes, through enhanced and/or revised practices and processes. However, good team work is not automatic. It is the instructional leader's responsibility to activate their team and to develop them as effective vehicles for school improvement (Mbokazi, 2015). Within this need for dialogue and discussion, it is the responsibility of all school leaders to ensure that coaching or mentoring of colleagues takes place as an integral part of the school development and improvement strategy and direction. This is especially, but not exclusively, important for those new to the school, to assist professional development for the benefit of the school, the teachers and the learners.

## Developing plans for improving the quality of teaching and learning in your school

School improvement plans, or development plans, generally include a sequence of activities beginning with a needs assessment or situational analysis, followed by planning, implementation or action, and evaluation, leading to a further development cycle. The following activity highlights why and how the first stages of such plans can be formulated in your school context.

### Activity 38: Formative assessment: improving quality of teaching and learning in context

**Suggested time:**

2 hours

**Aim:**

To help you assess the quality of teaching and learning in your school and develop a data (information) gathering tool.

**What you will do:**

1. Answer the questions in the checklist in Table 11.
2. As an individual, reflect on the picture that emerges for your school. Try to be as objective and honest in your responses to the checklist as you can, and in your analysis of what you have found out.
3. This activity can be used to help you identify the WPP in your own school that you are required to



develop and complete by the end the whole programme.

**Table 11: Ways of leading and managing**

<b>Ways of leading and managing</b>	<b>Always (3)</b>	<b>Often (2)</b>	<b>Seldom (1)</b>	<b>Never (0)</b>	<b>Steps for improvement</b>
Do the SMT regularly talk about their shared purpose and vision of learning between themselves?					
Do the SMT regularly talk about their shared purpose and vision of learning with other school stakeholders?					
Do the SMT communicate their values and mission in the things they do, how they spend their time, and what they consider important?					
Do the SMT all take collective responsibility for school practices, safety, health, and discipline?					
Do the SMT embody <i>power through</i> and not <i>power over</i> people?					
Do the SMT use (a) alternative punishment (not corporal/body punishment) and (b) positive rewards?					
Do the SMT facilitate, guide, and/or coach others to adopt practices that advance the performance of their learners (academic and social)?					
Do the SMT provide social support for high achievement (learners, staff)?					
Do the SMT communicate a passion for learning and challenge ineffective practices?					
Do the SMT support research-based, risk-taking and innovative practices?					
Do the SMT have discussions and inquiry about teaching, learning and assessment practices?					
Do the SMT have discussions and inquiry about leading and managing practices?					
Do the SMT share information and research with each other and with relevant school stakeholders?					
Do the SMT attempt to solve problems collaboratively/together?					
Do the SMT use multiple approaches and solutions or rely on single answers from past practices?					
Do the SMT consider a variety of points of view for solving important problems?					
Do the SMT make decisions that are consensual and inclusive of the wider school community?					
Do the SMT provide formal and informal ways for staff or learners to raise and/or solve problems?					
Do the SMT expect teachers to keep the focus on learning outcomes rather than teaching inputs?					

Ways of leading and managing	Always	Often	Seldom	Never	Steps for improvement
	(3)	(2)	(1)	(0)	
Do learners acquire essential skills and knowledge at sufficiently high levels?					
Are learners actively engaged in sense-making events such as internal discussions, inter-school debates and/or field visits?					
Do classroom practices develop values, critical and higher order thinking skills, and where appropriate, memorisation of procedures, concepts and skills?					
Do classroom practices provide opportunities for learners to apply and use knowledge in a variety of contexts?					
Does the SMT support learners to be responsible for their own learning outcomes?					
Is there a variety of learning experiences and styles – such as cooperative/group learning and independent work, with or without competition?					
Is there interdisciplinary learning in the curriculum, e.g. themes or topics that are explored through languages, social sciences and natural sciences?					
Do learning experiences in the school incorporate out-of-class resources, for example, visits, trips, experiences, practical work, the Internet, business?					
Do the SMT find the time, resources, and support for professional development to improve their teaching and learning?					
Do the SMT share their new learning, successes, and failures (model life-long learning)?					

### Discussion of the activity

How easy or difficult was it to answer the questions? Think about why this was the case for you. Some reasons could be that you are the principal or you are *not* the principal; you are a member of the SMT or you are not a member; what you have check-listed is policy but is not happening in practice.

This exercise provides a valuable means of establishing the school's current position, and will help you in conducting an analysis of the school's needs, prior to deciding on the WWP which you will be developing. If your responses are mostly negative for your context, you have to think about how you will be able to introduce and sustain innovation to bring about improvement. You will learn more about this process in *Module 4: Leading and managing people and change*, and *Module 6: Leading and managing the school as an organisation*. It will be useful to ask other colleagues to complete the exercise too, and this would be a helpful starting point as a collaborative exercise for your school improvement development. Schools operate in different contexts and different people interpret the strengths, weaknesses, opportunities and threats of their contexts differently. Therefore, you must remember that the final decision of what you wish to develop and implement for your WPP is your individual responsibility.

## Key points

Key points consolidating the learning in this unit include:

- Schools should be seeking continuous improvement in the quality of teaching and learning and that requires continuous monitoring of performance and achievement against goals.
- In the context of CAPS, this monitoring involves more than simply a technical and administrative process of checking whether lesson plans, etc. have been written. It involves asking critical questions about a wide variety of factors that will impact on the quality of teaching and learning.
- Schools should be able to model good classroom practices and engage in productive dialogue about how to improve teaching and learning.
- Schools should consider the use of digital and information communication technology as an important and valuable teaching and learning tool in the classroom.
- School leaders have a critical role to play in monitoring teaching and learning both as SMT members and as curriculum leaders in their own departments.
- Monitoring as a management function is a continuous and cyclical process not a once-off event.
- Monitoring involves observing classroom practices and providing constructive feedback to teachers.
- Encouraging the development of teams and CoPs within and beyond the processes established for the IQMS, can help school leaders and managers find a workable balance between monitoring practice and respecting professional autonomy as well addressing issues of trust and accountability.

## Conclusion

This module, through its three units, has provided an opportunity for you to engage with the core purpose of schools: that is leading and managing schools for the provision of quality teaching and learning. You have been introduced to the processes and practices needed to enable deeper understanding of the importance of the central role of the instructional leader in this process, within a learning organisation. The concepts, ideas and theories introduced here will in many instances be discussed in greater depth in the other modules: *Module 3: Leading and managing extra- and co-curricular activities; Module 4: Leading and managing people and change; Module 5: Working with and for the wider community; Module 6: Leading and managing the school as an organisation and Module 7: Working within and for the school system.*

The module has argued that the key requirement of the leadership roles for principals, deputy principals, HODs and SMT members is that they focus centrally on teaching and learning rather than on routine administration tasks, a criticism that has been levelled at schools in recent years. Although giving attention to administration tasks is a critical part of the overall management and efficiency process, this work *supports* the core purpose of schools but is *not* the core purpose in itself. To improve the quality of teaching and learning requires a strong focus on instructional leadership. This means attempting to change the mind set of leaders to regard the processes of teaching and learning as central to their role, rather than simply leaving such matters to classroom teachers. This will involve a collaborative approach, a willingness to engage with classroom teachers through structures and processes that have been set up, and a belief in working together. This can be achieved through establishing CoPs, for example.

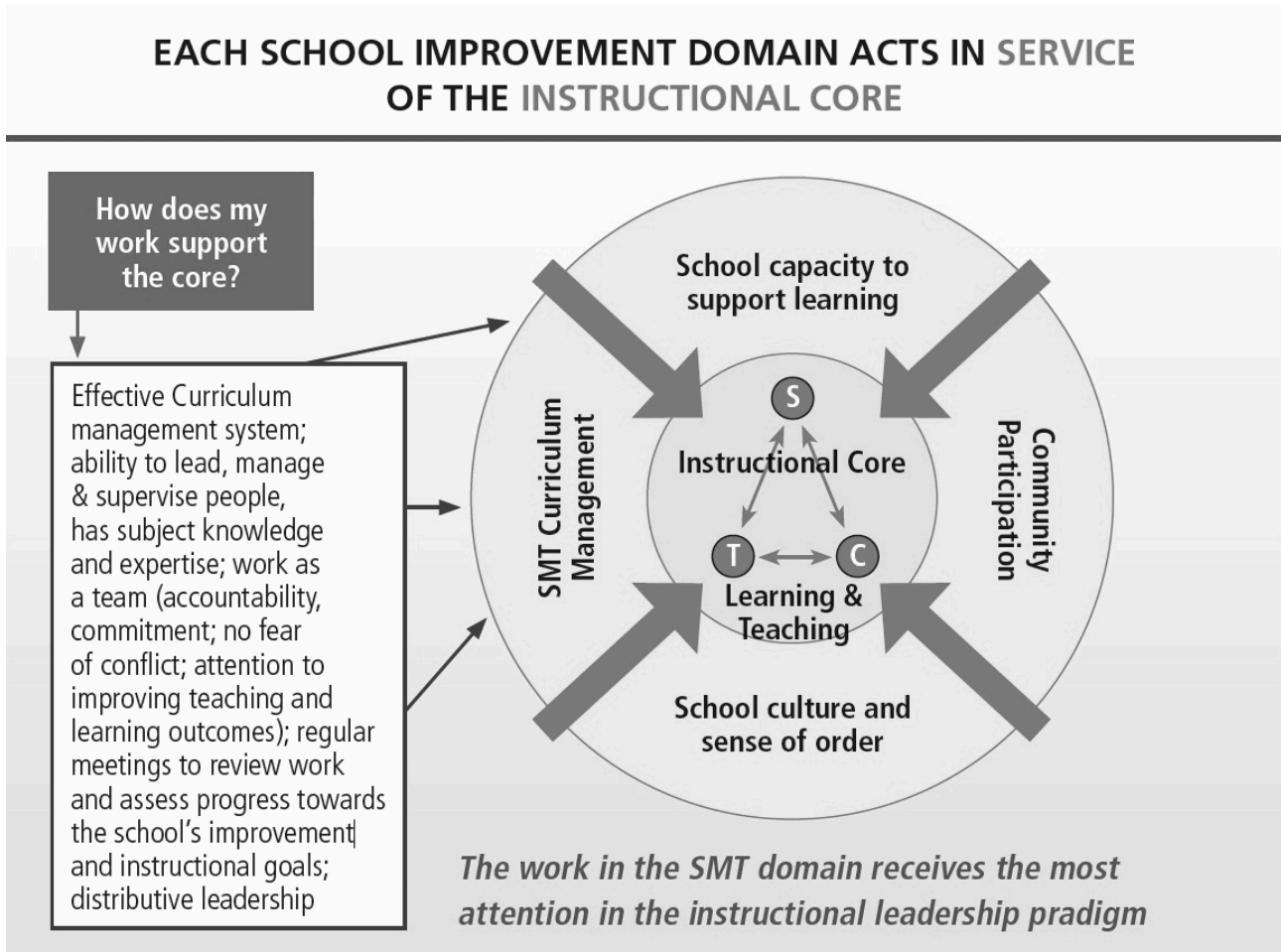
The module has emphasised:

- A strong and lasting focus on teaching and learning as the main purpose of schooling.
- School leaders to have a knowledge and understanding of curriculum theories, design, implementation and evaluation, and the impact of this on their own school contexts.
- Personal and professional development to enable principals and other school leaders to model good practices and to monitor and evaluate classroom activities.
- A commitment to openness, dialogue and distributed leadership, recognising that expertise may be independent of formal hierarchies.

The module has shown that a learning-centred approach in South Africa, and elsewhere, needs to begin with an audit of the context served by the school, which maps the socio-economic background of the community and relates it to the role of the school and the needs of learners. Improving the quality of learning for all learners requires a sensitive appreciation of the circumstances and home contexts which impact upon and influence learners' learning. While schools cannot address all these socio-economic problems, leaders need to be aware of the ways in which they affect learning, and what the school can do to lessen the negative effects of these problems on learners.

It has been emphasised that it is essential for school leaders to develop and drive a vision for the school that places learning and teaching at the centre. Whatever their sphere of influence, leaders should provide good models in terms of lesson preparation, subject knowledge, pedagogic approaches, assessment, and learner welfare. They should monitor teachers' practices in a systematic way and provide constructive feedback. They should also evaluate school outcomes and benchmark them against schools in similar circumstances. Above all, the school has to deliver on the official curriculum and the curriculum that is part of the school and its culture. Instructional leaders should promote a positive approach to learning among all stakeholders; learners, teachers, parents/carers and the local community. This provides the best prospect of sustainable school improvement. With effective instructional leadership, schools, their teachers and learners can flourish. This can be done through ensuring, against all the odds that they may face in their school and in its wider community context, that the core purpose of schools is achieved – the provision of quality teaching and learning.

A possible way to summarise the overall argument of this module is provided in the following diagram:



**Figure 9: Instructional leadership paradigm**

(Source: Witten, 2017: 54)



## Reflective Commentary Report on Module 2

The Reflective Commentary Report is used to record your reflections, thoughts and ideas related to your own learning and professional development journey as you work through this (and later, the other modules of the AdvDip (SLM) programme). As discussed in Module 1 *Professional Portfolio and Workplace Project* Unit 4, this information will also be useful when you prepare your Personal Professional and Organisational Development Plan (PPODP).

### Take note

The reflective commentary that you prepare for this Module is important as it has to be included in your Professional Portfolio which will be submitted for summative assessment.

### Suggested time:

90 minutes

### What you will do:

**Step 1:** If you have made any notes in your Learning Journal about Module 2 refer back to these notes now.

**Step 2:** Reflect on your experience of working through Module 2. Make brief notes on what you think are the most important learning points.

**Step 3:** Read the guidelines below to assist you to structure the writing of your Reflective Commentary Report.

### Guidelines for writing a Reflective Commentary Report

1. Write a short introduction which explains *what* the focus of the reflection is.
2. Write the *story of your learning*. Differently put, explain what have you learnt from studying this module.
3. The application of your learnings to your school context: Explain *how you have applied* what you have learnt in your own school.

4. The result of your attempts to use these new learnings from this module in your context: Write up positive outcomes achieved as a result of you applying your new skills and knowledge related to leading teaching and learning in your school.
5. Prepare and write up the conclusions that you can draw about these learnings and their application.
6. End your reflection by stating what you believe you *still need to learn* about leading and managing teaching and learning in your school.

**Step 4:** Write your Reflective Commentary Report, make sure you have addressed each of the points above.

**Step 5:** Read aloud what you have written, and make revisions as necessary.

**Step 6:** Share your report with a HEI CoP partner. Ask your partner to give you constructive feedback. Carefully consider the input received from your HEI CoP partner and incorporate relevant feedback that you have received into your report.

**Step 7:** Ensure that you include your Module 2 Reflective Commentary Report in your Professional Portfolio.



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## Appendix: List of additional multimedia resources

The following are additional multimedia resources that you can engage with:

### Canada, Geoffrey

Geoffrey Canada is an American educator, social activist and author. Since 1990, Canada has been president of the Harlem Children's Zone in New York, an organisation that aims to increase high school and college graduation rates among students in Harlem.

*Our failing schools: enough is enough!:*

[https://www.ted.com/talks/geoffrey\\_canada\\_our\\_failing\\_schools\\_enough\\_is\\_enough/discussion?quote=2155](https://www.ted.com/talks/geoffrey_canada_our_failing_schools_enough_is_enough/discussion?quote=2155)  
(Duration: 17.04)

### Hattie, John

Professor John Hattie is a researcher in education. His research interests include performance indicators, models of measurement and evaluation of teaching and learning. Two of his books are: *Visible learning* and *Visible learning for teachers*. According to John Hattie, visible learning is the result of 15 years of research about what works best for learning in schools.

*Instructional leadership:*

<https://www.youtube.com/watch?v=9UYGrk1VpcQ> (Duration: 5.58)

### Instructional rounds

The Australian Institute for Teaching and School Leadership (AITSL) has produced a number of short videos on classroom observation strategies. In this one, a group of leaders and teachers visit multiple classrooms at their own or another school with the aim to improve teaching and learning.

*Classroom observation strategies: instructional rounds:*

<https://www.youtube.com/watch?v=aOtzYoR3gxA> (Duration: 7.35)

In 2013, every school in the Oakland Unified School District in California, hosted two instructional rounds visits. More than 800 classrooms were observed to monitor patterns of student learning across the schools.

*Instructional rounds:*

[https://www.youtube.com/watch?v=FM8yPvz\\_b2k](https://www.youtube.com/watch?v=FM8yPvz_b2k) (Duration: 5.35)

### Learning resources

Designing learning interventions and sourcing, adapting or creating supportive learning resources should be a collaborative and team-based effort rather than the responsibility of individual teachers working alone and in isolation. Examples of online CoPs in this regard include:

- At the Early Childhood Development (ECD) level, African Storybook:  
<http://www.africanstorybook.org/>
- At the primary level as well as secondary science, Teacher Education Sub-Saharan Africa:  
<http://www.tessafrica.net/>
- At the secondary level, NotesMaster: <https://notesmaster.com/>

### **Osborn, Justin**

In 2017 Justin Osborn was at the Beijing Normal University pursuing a PhD in Education. He produced this video on instructional leadership for principals. In it he discusses the Effective Schools Movement in depth; as well as the history, theory, progression and policy implications of instructional leadership.

*Instructional leadership in education:*

<https://www.youtube.com/watch?v=jCwP4PIEfQ8> (Duration: 13.21)

### **Piedmont Intermediate School**

At Piedmont Intermediate School in California, teachers demonstrate the key components to effective teacher collaboration.

*Key elements for effective teacher collaboration:*

<https://www.youtube.com/watch?v=leB13CFt8a8> (Duration: 5.36)

### **Pierson, Rita**

Rita F. Pierson spent her entire life in or around the classroom, having followed both her parents and grandparents into a career as an educator. She emphasises the need for good relationships in education and learning.

*Every kid needs a champion:*

[https://www.ted.com/talks/rita\\_pierson\\_every\\_kid\\_needs\\_a\\_champion](https://www.ted.com/talks/rita_pierson_every_kid_needs_a_champion) (Duration: 7.45)

### **Quinine, Donte**

Donte Quinine discusses the evolution of leadership and how simple acts of leadership can have a huge impact. In collaborative leadership the focus is on the ordinary contributions from many people rather than the extraordinary contributions of a few.

*New school leadership:*

<https://www.youtube.com/watch?v=BcbWTjVnIrc> (Duration: 17.31)

### **Smart Schools Project**

As part of the Smart Schools Project, 88 000 tablets were distributed to learners in public schools in Gauteng.

*South Africa's public schools go digital:*

<https://www.youtube.com/watch?v=ujRkW574SYE> (Duration: 2.53)

### **T M Setiloane Intermediate School**

Mr Potsane teaches at T M Setiloane School in ThabaNchu. This lesson is a Grade 9 Maths lesson on percentages. The narrated edit of his lesson demonstrates his good time- and classroom-management skills and how he promotes active learning, despite the largely unfavourable contextual conditions.

*Mr Potsane teaches maths in a South African township school:*

<https://www.youtube.com/watch?v=Jumcd62eyPc> (Duration: 10.50)

### **Wildwood IB World Magnet School**

At Wildwood IB World Magnet School, in Chicago, teacher collaboration fosters a supportive professional culture, lessens teacher conflict, and provides participants with school-wide best practices.

*Teacher collaboration: spreading best practices school-wide:*

<https://www.youtube.com/watch?v=85HUMHBXJf4> (Duration: 3.26)