DOCUMENT RESUME

ED 460 058   SO 033 513

AUTHOR   Napier, Diane Brook; Napier, John D.; Lebeta, Vincent T.
TITLE   South African Educational Transformation and Sustainable
                 Development: Insights into Educational Reform from Remote
                 Area Schools in QwaQwa.
PUB DATE   2001-00-00
NOTE   16p.; Paper presented at the Botswana-Lesotho-Swaziland
                 (BOLESWA) International Educational Research Symposium (9th,
                 Gaborone, Botswana, July 28-August 4, 2001).
PUB TYPE   Reports - Research (143) -- Speeches/Meeting Papers (150)
EDRS PRICE   MF01/PC01 Plus Postage.
DESCRIPTORS   *Developing Nations; *Educational Change; *Educational
                 Improvement; Educational Research; Foreign Countries;
                 Geographic Isolation; Longitudinal Studies; *School Culture;
                 *Sustainable Development
IDENTIFIERS   Development Education; *South Africa

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address language rights as human rights, reduce backlogs, and promote
democratic schooling; whether educational transformation enhances social
harmony; and whether sustainable development is assisted by educational
reform. In phase one in two contrasting schools, key issues emerged related
to language/instructional medium, school ethos, administrator ideology,
school-community relations, and marked differences in penetration of
democratic reforms. The current phase extends the study to include other
primary schools in Phuthaditjhaba. Findings include developments at the phase
one schools, and insights into democratized education in the larger set of
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South African Educational Transformation and Sustainable Development: Insights into Educational Reform from Remote Area Schools in QwaQwa

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SOUTH AFRICAN EDUCATIONAL TRANSFORMATION AND SUSTAINABLE DEVELOPMENT: INSIGHTS INTO EDUCATIONAL REFORM FROM REMOTE AREA SCHOOLS IN QWAQWA*

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ABSTRACT

This is a report on the second phase of multiple-year research in Phuthaditjhaba schools of QwaQwa, South Africa, investigating implementation issues related to educational transformation. We investigated the extent to which educational reforms in these schools address language rights as human rights, reduce backlogs, and promote democratic schooling; whether educational transformation therefore enhances social harmony; and whether sustainable development is assisted by educational reform. In phase one of the study in two contrasting schools, key issues emerged related to language/instructional medium, school ethos and administrator ideology, school-community relations, and marked differences in penetration of democratic reforms. The current phase extends the study to include other primary schools in Phuthaditjhaba. The research findings include developments at the phase one schools, and insights into democratized education in the larger set of schools such as in language/instructional medium issues, teacher perceptions of OBE training and their own needs, and what is needed for sustainable development through improved education. We consider how development issues in these schools provide insight into the overall national process of transforming education and how sustainable development demands are shaped by local contextual factors.
Key Words: Educational Reform, Transformational Issues, Implementation Issues, Race, South Africa

Introduction

This is a report on the second phase of multiple-year research in Phuthaditjhaba schools in QwaQwa, South Africa, investigating implementation issues related to educational transformation. As the country experiences successive phases of implementation of the transformation reforms, the debate among scholars has moved from one focusing on policy formation during the transitional years, and policy critique, to one also focused on

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implementation factors. Much debate focuses on the issues surrounding development and implementation of various phases of Curriculum 2005/Curriculum 21 including the degree to which teachers in schools are receiving adequate training and support to implement the outcomes based curriculum. Scholars agree on the need for more research that documents the nature of reform implementation in a variety of settings, to uncover the facilitating and inhibiting factors influencing implementation of reforms at the micro level (see for instance Brook, 1996; Brook-Napier, Lebeta & Zungu, 2000; Brook Napier, Napier, & Lebeta, 2001a, b; Cross, 2001; Motala, 2001).

The research discussed in this paper focuses on the former Homeland area of QwaQwa which now forms part of the Orange Free State (Figure 1). Under apartheid, QwaQwa was one of many areas set aside by the government as "homeland" areas that were significantly disadvantaged in all aspects of human resource development and access to opportunity, in comparison to white areas in rural and urban settings. Qwa Qwa is situated on the mountainous area of the southeastern Orange Free State bordering on Lesotho, fringed by the Drakensberg Mountains. It is therefore also disadvantaged in terms of its relatively remote location, off the beaten track and isolated from the mainstream of main transport routes, large urban areas, and access to services and resources. Phuthaditjhaba, the main settlement of roughly half a million people, contains an assortment of small industries but has high unemployment and poverty rates, and has minimal potential for employment growth and economic development. The population is predominantly of Southern Sotho speakers. The apartheid-era homeland was administered by Afrikaans speaking whites, and the suburb of Witsieshoek was a white Afrikaner enclave housing this population. Under the new dispensation, QwaQwa was incorporated into the Orange Free State. Many whites left the area and moved to largely Afrikaans speaking towns such as

Harrismith and Bethlehem. Witsieshoek has now become a multiracial suburb of the larger settlement of Phuthaditjhaba.

Figure 1: Apartheid-era South Africa, showing location of QwaQwa
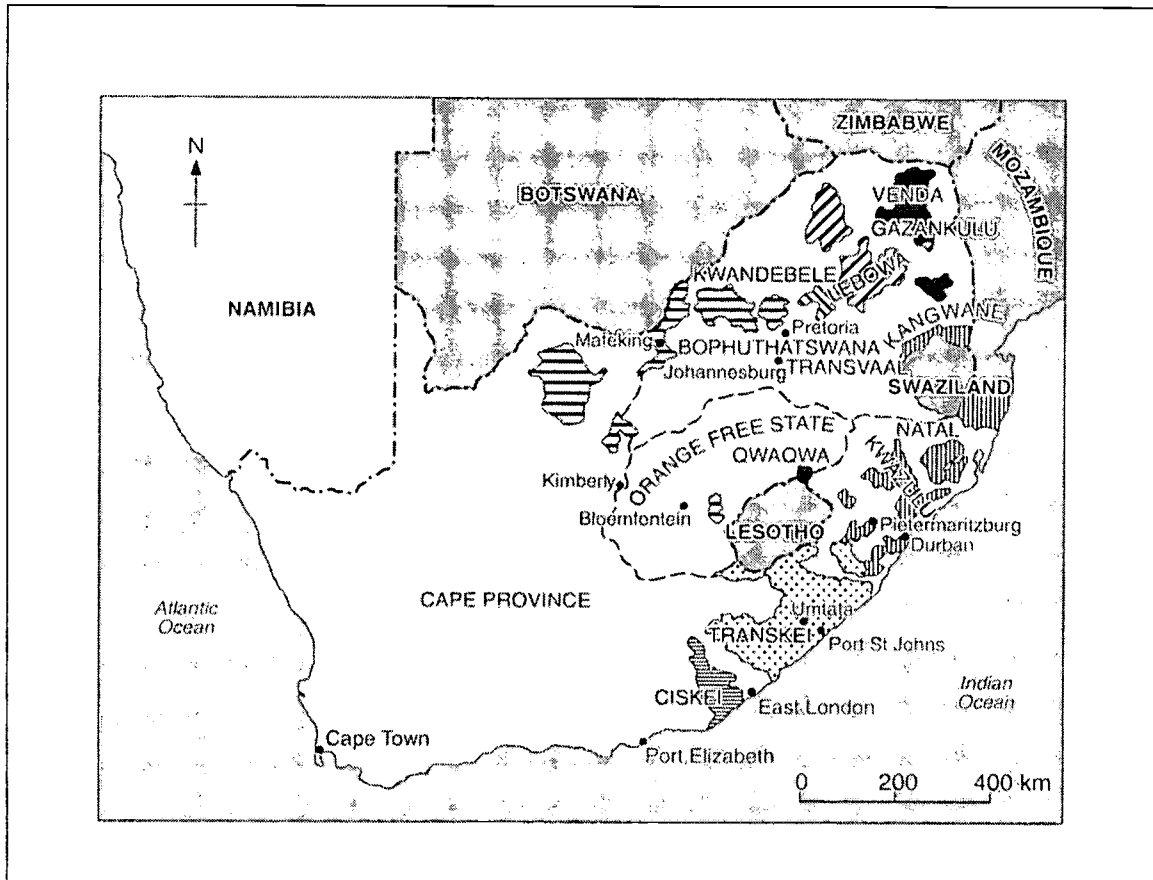
The University of the North, QwaQwa Campus (UNIQWA), is situated in Phuthaditjhaba. It was one of the historically black institutions established under apartheid to serve Africans. UNIQWA exhibits features of disadvantage typical of these institutions, but its is exaggerated because its main campus (the University of the North) is several hundred miles away in Northern Province, creating notable problems of access to central office decision makers and resources. In 2001, the process began to incorporate UNIQWA into the University of the Orange Free State under the higher education restructuring legislative mandate.

Schools in the area have been impacted by reforms under the new dispensation, designed to deracialize and democratize education. The schools still experience isolation and a legacy of disadvantage, generating questions about the extent to which educational transformation reforms have penetrated this area and its schools.

In the research reported here, we were interested in how the schools in the Phuthaditjhaba area were being impacted by transformational reforms such as implementation of the early phases of Curriculum 2005/21; what the key issues and needs were in the schools; and the degree to which democracy was penetrating this relatively remote, and historically disadvantaged area. Consequently, we were interested in whether or not reform initiatives were evident in the schools such as in addressing language rights as human rights, reducing backlogs among African pupils, addressing teachers' needs and needs of the local community, and promoting overall tenets of a more democratic form of schooling (see Brook Napier, Napier, & Lebeta, 2001a,b). Also, in more general terms, we were interested in the question of whether educational transformation enhanced social harmony in this area and whether sustainable development was being assisted by educational reforms.

Multiple Perspectives; Three Researchers

We adopted a research design that employed three researchers so that we could incorporate three different perspectives on the data and the findings. We developed a plan for a multiple year study in which the first phase focused on two schools and later phases focused on a broader sample of schools in the Phuthaditjhaba area. The specifics of the first two phases will be discussed later in this paper.

Lebeta provides the insider or emic perspective in the research. As a local resident; African; speaker of Southern Sotho, Afrikaans, and English; parent with a child in one of the sample schools; and as a senior administrator at UNIQWA, Lebeta brings insider insights and

observations to the study. He is also the key person for direct contacts with the schools and key informants during the year. Brook-Napier brings a partial insider – partial outsider perspective to the research, as South African educated, Afrikaans and English speaker, and researcher with experience in South African and international educational reforms. Brook-Napier's role as a South African with knowledge of the tough challenges in transformation enabled her acceptance in the research setting, working alongside Lebeta as a close colleague. Napier offers an outsider, etic, perspective as an American researcher and educationist with no ties to the local and national contexts, nor personal experience of the multiple legacies. His role as a researcher and colleague alongside Lebeta and Brook-Napier allows for a fresh view of the issues as they emerge in this research, and his being an American has created added interest in the research on the part of teachers and administrators in the schools. We have endeavored to use our respective roles in the research for purposes of triangulation, to verify and crosscheck our observations and our analytical findings.

First Phase of the Study

In the first Phase of the study, in 1999, two schools were purposefully selected as notable cases in point, on the basis of recommendations by Lebeta. In August 1999, Lebeta and Brook-Napier visited the schools and established contact with the administration and teachers to set up the conditions for first data collection the following July. One school was a former DET school for Africans situated in a "township" area of Phuthaditjhaba, which we term the "former Township School". The second school was a former white Afrikaans medium school in the former white suburb known as Witsieshoek, a school originally established to serve white families in the community, which we term the "Former Afrikaner School". The enrollment patterns of the two schools since 1996 are presented in Table 1. The Former Township School had twice the enrollment as the Former Afrikaner School by 2000, reflecting steady growth.

Enrollments at the Former Afrikaner School had declined during the mid 1990s, reaching their lowest point in 1996 when the school became a Model C school, as did all government schools, meaning that it was officially a non-racial semi—private school. African pupils enrolled at the school as white pupils moved out, largely to attend private boarding schools in nearby Harrismith and Bethlehem. By the year 2000 there were no white pupils in the former Afrikaans school.

Table 1: Enrollments in the Former Township and Former Afrikaner Schools for 1996-2000

Year	The Former Township School	The Former Afrikaner School
1996	834	166
1997	961	326
1998	989	359
1999	1088	422
2000	1096	516

In 2000, there were 28 teachers at the Former Township School. All were African and they spoke the home language of the students (Southern Sotho); the principal and assistant principal were African; and the staff were largely local residents with some teachers having been redeployed to jobs here. Although English medium of instruction was the policy at the school, early grade students were allowed to use their home language as they transitioned to instruction in English. Outside of class, teachers and pupils used the vernacular as well as English.

In 2000, there were 12 teachers and 4 additional temporary teachers at the Former Afrikaans School. Of these, only five teachers were African and two of these were temporary hires with pay levels of roughly 50% of those of the regular teachers. The administration and office staff of the school were white Afrikaners, who had been on staff at the school since before

the change in government. The instructional medium at this school was an issue of argument: while English was the principal language of instruction in some classes, several classes were still being taught in Afrikaans. Students are not allowed to use their home language anywhere at school, and most of the teachers did not speak Southern Sotho. Several of the white teachers had poor English skills.

Staff at both schools portrayed their school as disadvantaged in terms of resources, and serving students from impoverished homes. However, the Former Township School had even fewer support elements for teachers, for example in access to a photocopier. As a result of decreased incoming funds the school had lost its breakfast program in 2000. This program had been a significant helping factor previously in meeting impoverished students' needs. The fees charged by the schools differed significantly, with the Former Afrikaner school fees being five times higher. Both schools had governing board that included the principal and elected parents, as required by law, with the governing boards making the major decisions about expenditure and curriculum. However, in both schools, the principals still retained much influence over decisions made and over the ethos of their schools.

Data Collection and Analysis

In July/August 1999 Lebeta and Brook-Napier made the first site visits to the two schools, interviewing the administration and a selection of the staff that were available. We explored general questions with the interviewees related to our research questions. We observed some classes and playground activities, and Brook-Napier took photographs to document the context. As a gesture of reciprocity, copies of these photographs were also sent to the schools after Brook-Napier returned to the USA. In 2000, Napier joined the project. Lebeta, Brook-Napier, and Napier returned to the same two schools in early June to conduct more in-depth interviews with the staff, focusing on the key issues and needs and on the nature of Curriculum

2005 training and implementation activities in each school. Again, we take photographs and observed classroom instruction as well as playground activities.

Brook-Napier analyzed the field notes and photographs, compiled a detailed set of preliminary findings under 21 categories or issues, and presented these to the co-researchers for their additions, verifications, and comments. In so doing, we sought to triangulate our findings and to infuse our three different perspectives.

Findings at the end of Phase One

Based on our analysis of the data we identified 21 issues (Table 2) related to transformation to and implementation of the new national curriculum. These are the main points of comparison for the two schools. Some emerged as more negative or serious in the one school than in the other. Others emerged as issues present in both schools equally, or present in just one school. Still others emerged as a positive element in one school but a negative element in the other. At this stage of the research we did not prioritize or rank the issues. They are presented here in the following order based on the chronology of questions and interview/ observation data gathered in both schools in 1999-2000.

Table 2: 21 Issues found in the Phase One Schools

1. RELATIONS WITH THE DEPARTMENT OF EDUCATION
2. RELATIONSHIP BETWEEN ADMINISTRATION AND STAFF
3. STRONG PRINCIPAL, EVIDENCE OF LEADERSHIP AND VISION
4. SCHOOL SERVING STUDENTS' AND THE COMMUNITY'S NEEDS
5. LANGUAGE MEDIUM (English, English/Afrikaans versus vernacular)
6. POVERTY AND DISADVANTAGE
7. TEACHERS BASED IN THE FEEDER COMMUNITY; African/White teachers teaching African pupils?
8. HOME-SCHOOL CONTINUITY

9. HOME-SCHOOL DISCONTINUITY

10. FEAR AND JOB SECURITY

11. SCHOOLS UNDERRESOURCED

12. AIM TO BE A "BLACK SENTINEL" SCHOOL

13. OBE, C2005/C21, and TRANSFORMATION/CHANGE

14. DISCIPLINE ISSUES

15. PUPIL DIVERSITY (in terms of race, and in terms of SES)

16. CITIZENSHIP EDUCATION, DEMOCRACY, AND THE NEW SOUTH
    AFRICA   (In Life Skills/ Social Studies curriculum?)

17 TEACHER SHORTAGE PERCEIVED

18. AFRICANIZATION OF THE SCHOOL AND COMMUNITY

19. QUALITY/SPECIAL SCHOOL QUESTION

20. ETHOS/ ENVIRONMENT/ ATTITUDE/ TONE of school?

21. SCHOOL FUTURE?

In summary, the first phase of the study we found that key issues emerged related to language and instructional medium, school ethos and administrator ideology, school and community relations, home-school continuity in the Former Township School and discontinuity (with the white staff) in the Former Afrikaner School, and marked differences in penetration of democratic reforms. Of the two schools, the former Township school emerged as the one with greater stability. The Former Afrikaans School had undergone more significant change in terms of a complete transformation of enrollments yet its retention of a predominantly white and Afrikaans staff appeared to be closely related to the persistence of a school ethos in which use Afrikaans as the instructional medium and as an ideological tool were very evident. We presented the findings from Phase One of this research in more detail at the 2001 Comparative

and International Educational Society conference (see: Brook-Napier, Napier, and Lebeta, 2001a).

At the end of phase one, we were interested in continuing our research at these two schools to further investigate the issues we uncovered, to follow new leads such as in the Life Skills program which contained elements of democracy and citizenship, and to document any developments at these Phase One school sites. We were also interested in extending the research to a larger number of school sites in the area to ascertain whether the issues found at the phase one schools were also evident elsewhere, or whether these two schools represented special cases in point.

Second Phase of the Study

The second phase of the study was undertaken in June-August 2001. During our meetings in 2000, we framed a questionnaire to be sent to the two schools in phase one as well as to a wider sample of other primary schools in Phuthaditjhaba. Again, the specific focus of this phase of the study was to investigate how the schools in this area were addressing language rights as human rights, reducing backlogs, and promoting democratic schooling; whether educational transformation enhanced social harmony; and whether sustainable development was assisted by educational reforms.

School Sites and Subjects

The school sites for Phase Two of the study were purposefully selected by Lebeta, based on his knowledge of the local community and the spread of schools, to develop a sample that mirrored the different types of schools in Phuthaditjhaba, representing township, town-area, and rural settings. One of these schools was the former white town-area school discussed in the first phase of the study. The other two sites represent new cases in point as they were an additional township school but one with a mixed race staff, and a rural African school. The sites provided

insights from different subtypes of primary school in the Phuthaditjhaba area, even though all were officially classified as multiracial government schools. In each school, all the teachers were surveyed

Questionnaire and other data collection strategies

The questionnaire that we used contained 41 items and it was a modified and extended version of a questionnaire used by Khumalo *et al* (1999) in their study of outcomes based education (OBE) in grade 1 classrooms in the Northern Province, South Africa. We obtained permission from Khumalo *et al* for use of their questionnaire to develop a modified and extended version for our work. We modified the questionnaire to survey teachers in grades 1-6 concerning OBE. In addition, numerous additional questions were added to gather information to address our research questions in this research, therefore they focused on accessing teachers' perceptions of their real needs and on school needs in a broader sense than was the focus of the Khumalo et al instrument. The questionnaire contained 8 questions requiring a written response and 33 items that merely required checking a response. The principal components of the questionnaire are summarized in Table 3. The questionnaire was administered by Lebeta in the schools during June-July 2001. We conducted preliminary analysis of the data for reporting at the Boleswa 2001 in Gaborone, Botswana in August 2001.

Findings in Phase Two

As in phase one, we worked as a team to consider the findings after compilation of the field data and after analysis. At the BOLESWA 2001 conference in August 2001, we reported on our findings from the second phase of the research, including developments at the phase one schools that we obtained through the year as well as from the questionnaire responses. In particular, these included some interesting examples of entrenched authority and Afrikaner ideology at the former white school and some rich insights into teachers' frustrations with the

manner in which OBE was being implemented. Teachers and administrators reported a lack of vertical and horizontal coordination, inefficient workshops and training programs, persistence of top-down mindsets in reform implementation procedures, as well as in teachers' and learning facilitators' perceptions. The findings provided insights into the early stages of (and problems associated with) democratized education in these schools such as in language and instructional medium issues, teacher perceptions of OBE training and their own needs, and what is needed for sustainable development through improved education. We considered how development issues in these schools can provide insights into the overall national process of transforming education, given the multiple legacies present in these schools. For a more in-depth report on the Phase Two findings, see Brook Napier, Napier, & Lebeta (2001b).

As the nationwide transformation process in South Africa unfolds, it becomes evident that a mosaic of different manifestations of transformation is developing in different regions and places, with different versions coloured by local contextual factors and local versions of the apartheid-era legacies. In this research, we consider how sustainable development demands are shaped by local contextual factors, and how the ultimate outcome of development policies is bound to be highly variable in extent and character as a result of these factors as illustrated by the host of implementation issues emerging in these Phuthaditjhaba area schools, particularly with reference to the implementation of OBE reforms as "Curriculum 2005".

Table 3: Dimensions of the Teacher Questionnaire in Phase Two of the Study

Teacher Questionnaire

A. Your School
7 Items on grade taught and number of classes and learners

B. Teacher Biographical Details
8 Items on demographics, years of teaching experience, and qualifications

C. OBE Training
10 Items on training workshops, their usefulness, and additional training needed and wanted

D. Teaching Ability and Activities
4 Items on confidence and competence, and use of OBE advocated teaching strategies

E. Classroom Environment
6 Items on classroom setup, as related to the student centered approach advocated by OBE

F. OBE Materials and Resources
2 Items on the availability of materials for OBE activities either from self or school

G. Management Support
4 Items on administrative support for OBE activities and teachers' personal views about OBE and support

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