

**TITLE:**

**An autobiography of teaching and teacher evaluation in an apartheid and post-apartheid South Africa – Part Two**

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**ABSTRACT**

Evaluation of staff has always been a contentious issue in education and even more in South Africa where education and specifically schools were politicised during the years of struggle for a truly democratic dispensation. During this period teachers refused to participate in any form of evaluation or inspection as it was referred to then. Teachers believed that the evaluation system was forced on to them by the state. Furthermore, they regarded the system as totally unacceptable because it was undemocratic and non-participatory. Because the legitimacy of the evaluation system was doubted by the majority of teachers, it resulted in a decline in the quality of educational provision. The culture of teaching and learning in most Black schools was undermined to such an extent that hardly any bona fide evaluation took place during the latter stage of the struggle for freedom from White oppression namely, from the 1980s to the early 1990s (van der Bank, 2000).

## **An autobiography of teaching and teacher evaluation in an apartheid and post-apartheid South Africa – Part Two**

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### **Teacher evaluation during the apartheid era**

South Africa's evaluation system during the apartheid era was largely inspectorial and bureaucratic (Chetty, Chisholm, Gardiner, Magau & Vinjevd, 1993). They state that the system 'shared with all other aspects of the education bureaucracy a top-down, closed, hierarchical and authoritarian character' (p. 2). This statement supports the view of Jantjes (1996, p. 51) that teacher evaluation 'was shaped by the political, organisational, and instructional context or environment in which it took place'. This became evident when one looked at the fragmented nature of the educational management system in operation at this time.

The fragmented nature of education management was reflected in the structural arrangements through which teacher evaluation was conducted. There were fifteen education departments in South Africa, each with its own peculiarities. The experience of teachers in the different departments differed and the issues with which they were dissatisfied were also different. Against this background, supervision of teachers' work was oriented mainly towards improving examination results as a very narrow objective, rather than improving educational processes generally. Evaluation also focused on assessing teachers with a view to monetary or so-called merit awards, and it was overwhelmingly about compliance with departmental regulations, rather than addressing teachers about their teaching. The interests and needs of the teachers were not taken into consideration at all. As a result, teachers' perceptions of the evaluation system reflected a strong sense of distrust and anxiety.

Teachers strongly voiced dissatisfaction with the system. Chetty, Chislolm, Gardiner, Magau and Vinjevold (1993) quote teachers' perceptions of the major shortcomings of the evaluation system as follows:

- the prevalence of political bias in the system;
- the unchecked power which inspectors wielded;
- the victimisation of teachers on the basis of their organisational affiliations;
- keeping new teachers on probation for extended periods;
- the incompetence of inspectors;
- discrimination against women promotion candidates;
- the time it took to prepare 'record books' for inspection;
- the irrelevance of some evaluation criteria;
- the practice of 'one-off' visits which inspectors used for evaluation;
- the arbitrariness of the scores given for evaluation;
- the secrecy which surrounded the evaluation;
- the difficulties of challenging the inspectors' assessment;
- the absence of contextual factors in the evaluation;
- the abuse of patronage in cases of promotion;
- the abuse of merit awards. (p. 3)

Most of the above criticisms were directed at the inspectorate. In this system of evaluation, an inspectorate was involved which was primarily concerned with and divided into management functions and subject advisory services. The relationship between these two components varied considerably between and even within departments. Often, the departments with the highest number of poorly qualified teachers had the lowest numbers in supervisory and advisory staff because of constrained resources. The poor history and development of the relationship between management and advisory services in the different departments had an impact on the functioning of all the components of the system.

As a result, the legitimacy of the evaluation system was doubted and this resulted in a decline in the quality of educational provision. The culture of teaching and learning in most non-White schools was undermined to such an extent that evaluation of teachers became non-existent during the late 1980s to 1990. The situation at a large number of schools reached a climax and it became almost impossible for inspectors and subject advisers to visit schools. The politicisation of teachers resulted in them becoming defiant and they opposed what they considered to be an autocratic teacher evaluation system. They refused point-blank to have their work inspected or evaluated until the system was totally democratic and fully participative of all teachers.

#### **Teacher evaluation in House of Delegates (Indian schools)**

Up until 1993 the South African education system was divided into fifteen departments of education. These departments of education were the Department of National Education; three Departments for Education and Culture for Whites, Indians and Coloureds; the Department of Education and Training, responsible for African education in urban areas, six Departments of Education and Culture for self-governing territories; and four Departments of Education for independent states.

The Department of National Education was established as a result of the *National Policy for General Education Affairs Act 76, 1984*. It was responsible for the formulation of the education policy for all education departments. In addition, the Department of National Education developed national policies and standards for certification and remuneration (Behr, 1984, p. 369). These policies on educational matters were expressed in the South African National Education Policy publications which were issued to the various departments of education. These policies also expressed the general policy regarding the evaluation of

teachers. Teacher evaluation was generally used for the evaluation of teachers on probation, for promotion and for merit awards (Jarvis, 1982; Pillay, 1991). In short, the Department of National Education was responsible for 'general affairs' as stated in the *Republic of South Africa Constitution Act 110, 1983*.

Each of the other fourteen departments of education regulated their 'own affairs' specific to each population group in South Africa. The *Republic of South Africa Constitution Act 110, 1983* defines 'own affairs' as those matters:

which specifically or differentially affect a population group in relation to the maintenance of its identity and the upholding and furtherance of its way of life, culture, traditions and customs.

Hence, the House of Assembly (the ruling house in parliament) regulated education for Whites within parliament. The House of Delegates was responsible for Indian education and the House of Representatives was in charge of education for Coloureds. However, the Department of Education and Training, which was in charge of African education in urban areas, was not represented by a house in parliament.

Teacher evaluation in the House of Delegates schools was implemented at four different levels. Newly appointed teachers were evaluated by the principal, the subject advisor, and/or the regional inspector before confirmation of the appointment. Teachers in permanent posts could be evaluated for merit awards by the principal of the school and the regional inspector. Evaluation could also be conducted by a panel of interviewers for teachers in promotion posts such as principals, deputy principals and heads of departments. In addition, teachers were subject to routine evaluations carried out on a regular basis by the administrative staff of a school.

## **Teachers on probation**

A new teacher in the House of Delegates was subjected to a one-year probationary period. The teacher was assessed by the principal, deputy principal, the head of department (internal evaluation) and then by the subject adviser and/or regional inspector. Once the teacher was evaluated, he/she was issued with a certificate of confirmation which was signed by the subject adviser or regional inspector. If the teacher felt that the evaluation was unsatisfactory, he/she had the right to comment in writing his/her own comments on the evaluation form.

Confirmation of appointment meant that the teacher would receive his/her first salary increment. However, if a teacher received the assessment of 'weak', permanent appointment was not recommended. In this case, the probationary period was extended by six months. A teacher whose probationary period extended to three years had his/her service terminated.

During my probation year, I was evaluated on numerous occasions by the principal and administrative staff. I was fortunate to have had the opportunity of working with a very progressive staff. Help in the preparation for an evaluation from my subject advisers or the regional inspector came from all quarters and many sources.

I was evaluated by a White subject adviser for physical education in June 1983. (I was teaching physical education and English). The subject adviser arrived unannounced (a self-proclaimed practice with the intention being able to 'catch out teachers') at my school and asked to see me. He introduced himself and told me of his intentions. He 'sat-in' during six of my lessons and on numerous occasions interjected whilst I was teaching. This was indeed both frustrating and degrading as I was made to believe that I did not know how to teach. All of my record books were then subjected to detailed scrutiny. I was subsequently told to write

down word for word the suggestions that he was going to make. These suggestions were to be written in a special book called 'Subject adviser's suggestions'. This was one of the most humiliating experiences of my life because he even went to the extent of spelling out words for me. In addition, his suggestions were contestable. After being subjected to the evaluation ordeal for approximately five hours, I was told to follow him to the principal.

The principal and he had a lengthy discussion about my work. The subject adviser then asked me if I would 'confirm' myself as a teacher. I felt this question rather ambiguous, for obvious reasons. After justifying the work that I had done at the school, I replied in the affirmative. To my surprise, he replied, 'Consider yourself confirmed'. This was indeed a great relief for me because I was aware of numerous colleagues of mine who were not so fortunate.

Two months later, while teaching in the classroom, I received a message via the staff grapevine that the physical education subject adviser had arrived at school. I was summoned to the office. I was introduced to an Indian subject adviser and informed that the White subject adviser had fallen ill and that he had not submitted a report on me. I was to be re-evaluated. Thus, I had to endure the horrific process of evaluation all over again; only this time it was worse.

I was constantly 'corrected' while conducting lessons. The subject adviser even saw fit to conduct one of my lessons on his own. No permission was sought for this unethical behaviour. I was completely demoralised and felt totally incompetent. It came to a stage when I produced the 'Subject advisor's suggestions' book and drew his attention to the fact that my lessons were being conducted on the suggestions made by the previous adviser. I was rebuked rather savagely for not taking heed of the present suggestions being given and taken

to task for questioning authority. To add insult to injury, he also went through all my record books with a fine toothcomb finding fault with trivial sports-record keeping.

At the conclusion of the gruelling session some four hours later, I was told that I would be confirmed and that I was to receive a 'fair' assessment (lowest on the assessment rating scale). I questioned this low assessment and I was told that all first-year physical education teachers received this rating. The logic behind this reasoning was that if teachers received a 'good' assessment in their probation year of teaching, they were bound to receive an 'excellent' assessment within a space of five years, if one took totally into consideration the regularity of evaluations and teachers' experience. An 'excellent' assessment meant that the teacher was now promotable. Promotion also meant higher salaries. The financial ramifications of promotion would place severe financial constraints on the state. This had to be avoided at all costs. Furthermore, young, radical, progressive and 'excellent' teachers in administrative posts would pose a serious threat to the autocratic educational system. Submissiveness had to be maintained in all quarters.

### **Evaluation of teachers for merit awards**

Teacher evaluation for merit awards was introduced by the Public Service Commission as a 'merit assessment' in 1977. The merit assessment system had for some time been in use for other government employees. It meant monetary awards in the form of extra salary notches for high achievers. The evaluation consisted of two report forms: one analytical and the other global.

On the one hand, the analytical report form was based on a seven-point scale and had eighteen criteria. There were four broad categories: the teacher in the classroom; extra-



curricular component; the teacher as a person; and the professional image. A teacher who obtained a score of 108 out of 126 qualified for a merit award (Pillay, 1991). However, the number of awards was limited to 25 per cent of the total number of eligible teachers annually.

The global report, on the other hand, was prepared by the principal of the school since he/she had immediate contact with the teacher. It assessed the qualitative aspects of the teacher. The overall qualitative aspect of the teacher included human relations, personal appearance and general conduct of the teacher.

I was one of the fortunate 25 per cent of teachers to receive a merit award in 1993. I must state that this award was granted purely on merit at my school. All eligible teachers at the school were assessed by members of the administration staff and the principal. Unlike the situation in some schools where merit assessments were equated with nepotism and favouritism, teachers at my school agreed that the assessments they received were considered fair and democratic.

The following excerpts from a 'referee's form' prepared by the principal on my behalf bear testimony of my teaching:

He is a diligent teacher, painstaking and methodical in his work. His lesson plans, preparation, classroom time budgeting, presentation, control of pupils, oral and written work has always been of a very high standard (Nambiar, 1997, p. 1)

He is hardworking, sincere and dedicated to the profession he has chosen. His quest for maintaining the highest standards at all times is consistent with an individual who has the potential and the vision of not only achieving the highest rungs of the professional ladder but that of an individual who will focus on the ethos of the school and the community. I had no hesitation in recommending him for a merit award for his excellent work. This was granted in 1993. (Nambiar, 1997, pp. 1-2)

While many unsuccessful teachers were critical of those who received merit awards, I bore no ill feeling towards them because many deserving teachers in some schools were overlooked for merit awards for petty reasons. In my case, I honestly and sincerely knew that I had earned my merit award. That was the first and only merit award that I received after teaching for a period of eleven years.

### **Evaluation of teachers for promotion**

Promotion posts were advertised in departmental circular minutes. They were accompanied by an annexure providing all the details of the post. A teacher who satisfied the requirements of these posts could apply for them in the order of his/her preference or priorities.

A list of all applicants was compiled and sent to all those candidates who had applied. They were invited to attend the evaluation meeting. The evaluation meeting was composed of the chief superintendent, all regional superintendents, the chief school psychologist, two representatives of each teacher's society, and two personnel from administration. The chief superintendent chaired the evaluation meeting. The regional superintendent of the school that advertised the post would inform the meeting of the ethos of the school and the recommendations of its advisory school committee. Superintendents evaluated teachers in accordance with guidelines set out by the individual department, in this case, the House of Delegates, as well as the requirements of the advertised post.

The most important criterion for promotion was seniority. Priority was given to those teachers who had long service in a particular post or at a particular level. If rival candidates had the same date of entry and the same salary scale, then qualifications or the number of merit awards gained were taken into account (Jarvis, 1982; Pillay, 1991).

At the evaluation meeting, each applicant received a final symbol (A—excellent; B—highly suitable; C—suitable; D—unsuitable). The list of all possible candidates was compiled and sent to the promotions committee, which consisted of the chief superintendent and the regional superintendent of the school which had advertised the post.

The promotions committee, in turn, compiled a short list, in order of preference, for the attention of the management committee. The management committee consisted of the chief executive director and his/her deputies. They finally chose the suitable candidate from the list provided for each post.

Most of the above procedures for promotion candidates existed until 1993. The election of a democratic government in April 1994 ushered in a new educational dispensation for all educators. Governing councils were elected in most schools. One of the main functions of the governing council was to scrutinise applications submitted by candidates for promotion and to appoint the most suitable candidate at their school. In essence, what this meant was that the governing council had the final choice in the appointment of candidates.

I found this system of selection totally unacceptable for the following reasons:

- Many elected members on the governing council had little or no knowledge of the politics of teaching.
- Many were totally ignorant of the day-to-day running of school.
- The issue of nepotism and favouritism was sure to rear its ugly head. Indeed, this did happen at many schools.
- Teachers in ‘acting posts’ were promoted at the expense of other dynamic and progressive candidates. The premise being here that ‘outsiders’ or ‘new blood’ would have a disruptive influence on the smooth running of the school.

- The devolution of power to governing councils absolved the Department of Education from executing most of the duties it was responsible for. This indeed has had serious repercussions for teaching in South Africa.

Devolution of power also meant that the governing councils had a direct say in the organisational and administrative role functions of the school. Differences in ideology between members of staff and members of governing councils often resulted in the victimisation of the former. Being vocal or outspoken was a sure recipe for stagnation or educational suicide. Chances of promotion at the school you were teaching at became a non-reality. Many deserving, dedicated and committed teachers were deprived of promotion because of their personal philosophies and educational principles.

### **Routine evaluations**

Routine evaluations were carried out on a regular basis at schools. Teachers were evaluated by members of the administration staff. On average, teachers were evaluated at least once a month per subject taught. Teachers were not forewarned as to when these evaluations would take place. Members of the management team had the privilege of ‘sitting in’ on their lessons when it suited them. The lesson content and their teaching methodology were evaluated. In addition, teachers’ records and pupils’ books were scrutinised. The written reports emanating from these evaluations were of little or no use to teachers because very little positive feedback was given. Many administrators took delight in belittling teachers for they felt that their position in the hierarchical structure symbolised superiority and a ‘know-all’ attitude.

Affected teachers had very little cause for redress. Reporting contentious issues to teacher unions often resulted in long-drawn out battles between teachers and the Department of Education. In most cases, teachers ended up second best. Many were left demoralised and

financially worse off than they were before. Thus, a large majority of teachers became passive recipients of this autocratic policy of evaluation.

Worth mentioning at this juncture is another personal experience of teacher evaluation that left an indelible mark in my memory. This occurred while I was teaching at my first primary school. The principal and I got into an altercation over my attire. This resulted in me being evaluated six times in the space of a year. These were not internal school evaluations but evaluations by subject advisors, superintendents and the chief superintendent of education. Little did I realise that the principal was in cahoots with his superiors.

As a result of these intensive evaluations, numerous faults were found in my teaching methodology, classroom administrative duties and record books. I received an assessment of 'unfair' which technically meant that I was incapable of teaching. I refused to sign the reports because this was clearly a case of blatant victimisation. Not to be outdone by these sadistic bureaucrats, I contacted the director-general of education and explained my plight. We met and I was assured that the matter would be rectified. Bureaucratic red tape and bungling prevented the matter from being resolved. I was then informed by the principal that I was not needed in his school. I had no option but to seek employment in another school which was organised through a network of friends with whom I socialised.

The above assessment that I received was totally contradictory, for in 1993 I received a merit award from the Department of Education for outstanding work in teaching.

It must be stressed that most departments of education evaluated teachers for probation, promotion and merit awards. The House of Delegates evaluated newly appointed teachers for

confirmation of their appointments. Principals' reports for this type of evaluation were made available to teachers since they had to endorse them. However, teachers were not allowed access to reports for promotion and merit awards. The confidentiality of these reports prompted teachers to have a negative perception of evaluation. The introduction of the merit award system which was intended for monetary gains was open to nepotism, favouritism and misuse. As a result, it was criticised extensively.

Furthermore, the evaluation system was based both upon the presage model and the process model. It was based on the presage model because it had a component that evaluated the teacher's character and personality. Critics argue that the presage model is inadequate on its own to provide objective data for teacher development. The same applies to the process model. The evaluation system in the House of Delegates attempted to assess teachers' abilities to teach and to make judgements without considering the impact of teacher action on pupils' behaviours.

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