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**An investigation of the management of implementation of
integrated quality management system (IQMS) in the
Department of Education: A case of Mafikeng Area Project
Office in the North West Province.**

By

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ABSTRACT

The National Department of Education of the Republic of South Africa introduced integrated quality management system (IQMS) in order to improve quality of learning and teaching.

This research focused on the effects of performance measurement in IQMS on educators' performance, its contribution to developmental purpose and pay progression and its effects on the improvement of education.

Stratified random sampling was used to select a sample from educators and school management team (SMT) from Mafikeng Area Project Office, North West Province. Data were collected by means of questionnaire.

The study identified that both educators and SMT members were of the opinion that performance measures used in IQMS positively influenced the performance of educators, it is effective for developmental purpose and pay progression and finally it contributed to the improvement of education in schools.

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CHAPTER ONE

ORIENTATION

1.1 Introduction

The National Department of Education of the Republic of South Africa introduced an integrated quality management system (IQMS) in order to ensure quality public education for all. This initiative is meant to constantly improve the quality of learning and teaching. The purpose of this research is to provide an overview of the implementation of IQMS and the outcomes it achieved. The study focuses on the effects of measurement on educators' professional development, its appropriateness toward performance related pay and effect on learner performance. An attempt is made to evaluate whether or not introducing a system of performance measurement might ultimately help to improve quality of education in South Africa.

Apart from the accountability to the wider community, successful educational outcomes also depend upon empowering, motivating and training educators. Quality management seeks to monitor and support these processes. Evaluation of performance is a part of the educational process.

In order to enhance and monitor performance of education system, there are three programmes namely:

- Developmental Appraisal
- Performance Measurement and
- Whole School Evaluation (ELRC, Collective Agreement, 2003).

The developmental appraisal (DA) programme appraises individual educators in a transparent manner with a view to determining areas of strengths and weaknesses, and to draw up programmes for individual development.

The performance measurement (PM) programme evaluates individual teachers for salary progression, grade progression, affirmation of appointments and rewards and incentives.

The whole school evaluation (WSE) programme evaluates the overall effectiveness of a school including the support provided by the Area Project Office (APO), Institutional Support Coordinators (ISC), School Management, Infrastructure and learning resources as well as the quality of teaching and learning.

In order to achieve quality education the education labour relations council (ELRC) arrived at a collective agreement (ELRC, Collective Agreement, 2003) which identified the main features of IQMS as:

- Developmental appraisal (DA) and performance measurement (PM) inform and strengthen one another without duplication of structures and procedures.
- Performance measurement and developmental appraisal must be linked to an annual cycle, which must be completed within a calendar year.
- Developmental appraisal and performance measurement inform and strengthen internal whole school evaluation.
- The separate functions of DA, PM and WSE remain intact.

In relation to the main features, the purposes of quality management system are fivefold:

- To determine competence;
- To assess strengths and areas of development;
- To provide support and opportunities for development to assure continued growth;
- To promote accountability; and
- To monitor an institution's overall effectiveness.

(ELRC, Collective Agreement, 2003)

These tenets have led to the development of a single instrument to define the relationship among the different programmes of an integrated quality management system (IQMS) for evaluating the performance of institution-based educators.

1.2 Background to the study

The National Department of Education of South Africa has introduced many quality management programmes since 1996. It is one of the most important priorities of the

new government to improve efficiency of educators in performing their educational activities, teaching and learning process. Some of these programmes are DA, PM and WSE. These programmes are integrated and now known as integrated quality management system (IQMS) (ELRC, Collective Agreement, 2003).

For many years there have been no appropriate systems in place for evaluating the quality performance of the school. There was no comprehensive data collection mechanism on the quality of teaching and learning or on the education standards achieved. In order to provide this, IQMS was introduced.

It is designed to ensure support to educators and carried out according to an agreed national model, involving all stakeholders. It is aimed at improving the quality of education and educators in South African schools. Its purpose is to facilitate improvement of the whole education system (ELRC, Collective Agreement 2003).

1.3 Objectives

The study investigates the management of the implementation process of IQMS. More specifically the objectives of the research are to:

- investigate the effects of performance measurement in the performance of educators
- investigate the effectiveness of the process of IQMS in terms of the performance measurement for developmental purpose and pay progression.
- investigate whether IQMS has really contributed to the improvement of education in schools.

1.4 Importance of the study.

For the Department of Education, and for all educators, the main objective is to ensure quality public education for all learners and to constantly improve the quality of learning and teaching, and for this everybody is accountable to the community. The Department has the responsibility of providing facilities and resources to support learning and teaching. Successful educational outcomes also depend upon

empowering, motivating and training educators. Quality management seeks to monitor and support these processes.

When educators have to be evaluated for pay progression, summative evaluation becomes necessary. Performance measurement must be based on the work (and progress) that an educator has done during an academic year. The data must be compiled and submitted to salary assessment section of the department of education in order to effect pay progression in the following year.

It is envisaged that the study will provide the framework to identify the purpose and effectiveness of the performance measurement in the opinion of educators. Educators' perceptions concerning the appropriateness and reality of performance related pay need to be reported. The findings from the study will indicate whether the educators had a clear sense of purpose for the performance measurement and consequently had real commitment to it.

1.5 Scope of the study

The research is limited to educators in the secondary schools in the Mafikeng Area Project Office formerly known as Mafikeng District Education Office. This is an Area Project Office (APO) in the North West province of South Africa which consists of Tshwaranang (Cluster A), Montshioa Stadt (Cluster B), Mmabatho (Cluster C), Botshabelo (Cluster D), and Kopano (Cluster E). Each cluster is headed by Institutional Support Coordinators.

There are twenty nine (29) secondary school under Mafikeng APO: six in cluster A, nine in cluster B, six in cluster C, five in cluster D, and three in cluster E.

1.6 Plan of the study

In chapter one the reader was introduced to a clear understanding of the objectives of the study and the importance to undertake the study. The scope of the study and the plan of the study were also spelled out.

Chapter two focuses on the theoretical foundation of the study and literature review.

In chapter three the problem of the study is formulated. A full exposition of the research design and analysis is given in chapter four. In chapter five the research results are presented. The outcome of the study is discussed in chapter six. This chapter also includes limitations of this study, conclusions, and recommendations for future research

CHAPTER TWO

THEORETICAL FOUNDATION OF THE STUDY AND LITERATURE REVIEW

2.1 Introduction

Chapter one provided an understanding of the objectives of the study and the importance of undertaking the study. In this chapter the theoretical aspect of performance measurement in conjunction with performance appraisal and performance management in general are discussed. An attempt is made to bring in all aspects of performance management which is the basis of integrated quality management system (IQMS). Towards the latter part of this chapter an overview of performance management in terms of related literature is presented.

There is so much confusion, uncertainty and disagreement about the meaning and purposes of performance management (Brown, 2005). Many authors in the field have listed different definitions. In Brown (2005), Armstrong and Baron (1998) listed ten different definitions of performance management whilst both Rogers (1999) and Williams (2002) have a whole chapter questioning whether performance management is a distinctive body of management concepts and/or techniques. Brown (2005) considers performance management as an umbrella label consisting of a number of approaches.

According to Piggot-Irvine (2003) performance management is a macro-descriptor that encompasses all of the micro-processes associated with personnel management. Performance management is the bigger picture in which appraisal is located.

Performance measurement or appraisal is about making judgements on how well a particular job is performed, usually through a formal and planned annual system (Hope & Pickles, 1995). This can also be used to measure the overall performance of an organization. The Education Department is providing a framework for these purposes by having an integrated quality management system which consists of Developmental Appraisal, Performance Measurement and Whole School Evaluation.

For the purpose of this study, performance management and performance measurement are used interchangeably to mean any form of appraisal or assessment.

2.2 Performance measurement: a theoretical foundation

According to Hope & Pickles (1995), the purposes of performance measurement are to:

- help decision making about salaries or promotions

Performance is assessed and as a result of this, decisions can be made about pay and promotion.

- help personal or professional development

Performance assessment can help to identify learning from past successes and failures and the areas for improvement, thereby identifying the support, skills and necessary training required.

- help work planning and development

Once the performance is assessed, based on the feedback, future objectives can be set for the tasks.

- help organization and service development

Performance assessment enables the organisation to identify the need for the necessary changes in policy, programmes or service. It can develop methods to improve individual and service performance (Hope & Pickles, 1995)

Performance measurement is typically to improve service and for personal development. However, there may be conflict between appraisal for development of individual and appraisal for improving service.

Performance management is a means of getting better results from an organization, teams and individuals (Armstrong, 2000). In the early 1990s, performance management was often just another way of describing a more sophisticated

performance appraisal system (Armstrong & Murlis, 2000). Performance management is a process for establishing a shared understanding about what is to be achieved and how it is to be achieved; an approach to managing people that increases the probability of achieving success (Armstrong & Murlis, 2000). The process will revolve around measurement of performance. It involves continuing review of performance. It is about the agreement of objectives, knowledge, skills and competence requirements, and work and personal development plans. Performance management processes can be used for rating and the consequent rewarding of performance (Armstrong & Murlis, 2000).

The general management of an organisation can not be efficient without having a well-developed goal-setting and feed-back review mechanism which will assist in measuring the performance of the individuals thereby the overall performance of the organisation.

2.2.1 Nature of performance management

Performance management incorporates that part of management which emphasizes the importance of goal-setting and feedback- reviewing performance in relation to agreed objectives. It also includes many of the traditional appraisal approaches, but there is a difference between the two. Armstrong (2000) identified the salient features of performance management in this regard. Among these the following are worth noting:

- Performance management focuses on improving performance, developing competence and opportunities to develop skills, competence and careers. It may provide a basis for performance-related pay decision.
- In order to determine training and developmental needs effectively, techniques need to be devised which combine analysis at a number of different levels. The diagnosis of training needs is a process of information gathering and analysis. The knowledge, skills and abilities of the individual are commonly identified from performance appraisal (Bartram and Gibson, 1994).

There must be explicit performance standards that specify the procedures or outcomes against which employees' job performance can be clearly evaluated (Martocchio, 2004). The main performance standards should include such factors as quality, quantity, and timeliness of work. Effective performance appraisals drive effective merit pay programmes.

2.2.2 Types of performance appraisal plans

Specific performance appraisal methods are required to prepare effective merit pay programmes. Successful merit pay programmes are derived from appropriate appraisal approaches. According to Martocchio (2004), performance appraisal methods fall into four broad categories:

- **Trait systems**

Trait system asks raters to evaluate each employee's traits or characteristics, such as quality of work, appearance, dependability, cooperation, initiative, judgment, leadership, responsibility, decision-making ability, or creativity (Martocchio, 2004).

- **Comparison systems**

Comparison systems evaluate a given employee's performance against the performance of other employees.

- **Behavioural systems**

Behavioural systems rate employees on the extent to which they display successful job performance behaviours. In contrast to trait and comparison methods, behavioural methods rate objective job behaviours (Martocchio, 2004).

- **Goal-oriented systems**

Management by objectives (MBO) is the most effective performance appraisal technique because supervisors and employees determine objectives for employees to meet during the rating period and employees appraise how well they have achieved their objectives (Martocchio, 2004). Management by objectives is used mainly for managerial and professional employees and typically evaluate employees' progress toward strategic planning objectives.

2.2.3 Purposes and aims of performance management

Organisations implement performance management and/or measurement for a variety of purposes. In this regard Brown (2005), quoting Armstrong and Baron (1998), Williams (2002) and Poister (2003) puts forward the following:

- To provide information on and to improve organizational effectiveness and efficiency
- To provide information on and to improve employee's effectiveness and efficiency
- To focus employees' attention on areas deemed to be of greatest priority and improve levels of motivation
- To improve quality of employees' training and development and levels of accountability
- To align employees' objectives with those of the organization as a whole and so on

Gratton (2004) describes the main purposes of performance appraisal as accountability, professional development or a combination of both. Piggot-Irvine (2000), (in Piggot-Irvine 2003) also shares this view.

Performance management is a systematic and data oriented approach to managing people at work. It relies on positive reinforcement as the major way to maximise performance. It refers to the management of individuals and teams on a frequent and

ongoing basis. A key issue of performance appraisal is determining what constitute valid criteria or measure of effective performance. Appropriate criteria or measures of effective performance must be identified for each job for which a performance appraisal system is to be applied.

Bennett and Minty (1999) state that there are generally three major purposes of performance management:

- it is a process for strategy implementation;
- it is a vehicle for culture change; and
- it provides input to other human resources systems, such as development and remuneration.

According to Sloman (1997) (in Nel et.al. 2001), performance management systems are considered to be operating when the following conditions are met:

- a vision of objectives is communicated to employees;
- departmental and individual performance targets are set within wider objectives;
- a formal review of progress towards targets is conducted; and
- whole process is evaluated to improve effectiveness.

Gerber et al (1996) identify the aim of performance appraisal as:

- offering employees the opportunity to indicate the level and direction of their ambition;
- offering managers the opportunity to show an interest in employee development;
- identifying areas where specific training is needed;
- encouraging employees who have tried hard to perform well;
- communicating dissatisfaction on the part of the employee and employee performance that is unacceptable to the employer.

2.2.4 Performance appraisal techniques

According to Gerber et al (1996), there are three categories of performance appraisal techniques, namely

2.2.4.1 Individual appraisal methods

The employees are appraised individually without comparing with other employees. The following methods are used:

- **Graphic rating scale**

The performance evaluator receives a list of characteristics according to which he or she must evaluate an employee.

- **The forced choice method**

Here the performance evaluator must choose between statements that best describe the employee being evaluated.

- **The critical incident method**

A list of very effective and ineffective behaviour of the employee during appraisal period is prepared by the supervisor. These critical incidents are then combined into categories. At the end of performance appraisal period these incidents are evaluated.

- **The essay appraisal**

A checklist indicating the employee's performance or characteristics is listed as words or statements. Then weights can be allocated to the items in the checklist. The weighted checklist can be used to quantify the appraisal and a total performance score can be calculated.

2.2.4.2 Multiple performance appraisal methods

These methods involve techniques by which an employee's performance is compared to that of others. This includes the following:

- **Ranking order determination**

The evaluator ranks the employees from the highest to the lowest in terms of a global criterion. This allows identifying the best and worst employee but is difficult to place average employees into a ranking order.

- **Paired comparison**

Based on the criterion of evaluation the names of the people being evaluated appear on a sheet of paper in a previously determined order for comparison. Then the position in the ranking order is determined.

- **Forced distribution**

The employees are rated in fixed categories. The groups may be weakest, low average, average, high average and highest group. This helps to overcome the problems with high appraisals and to eliminate the central tendency problem.

2.2.4.3 Other performance appraisal methods

Other performance appraisal methods include

- Performance tests
- The field review method
- Self-appraisal and
- Assessment centres

Many other techniques are used in performance management. Self appraisal needs special mention as it is quite widely used in various appraisal methods as a component

of the appraisal process. Cardy and Dobbins (1994) (in McCarthy & Garavan, 2001) argue that self-appraisal is a natural development in performance appraisal and quite popular in organizations (McMahon and Gunnigle, 1994 in McCarthy & Garavan, 2001), but Baruch (1996) (in McCarthy & Garavan, 2001) maintains that it is the most neglected rating source. McMahon and Gunnigle (1994) (in McCarthy & Garavan, 2001) highlighted that 50% of UK employers; 40% of US organizations; and more than 50% of Irish employers use some form of self-appraisal.

2.2.5 Other Techniques of performance management

There are various other techniques to the performance management model. Some of the techniques in the performance management are:

- ABC model of behavioural change
- Balanced Scorecard Approach (BSA)
- Economic Value Added (EVA)
- 360- degree appraisal
- Management By Objectives (MBO)
- Developing Behaviourally Anchored Rating Scale (BARS)
- Systems Analysis (SA)

2.2.5.1 ABC model of behavioural change

This model is composed of three elements: Antecedents, Behaviour and Consequences (Ayers, 1995). ABC model is an instrument that helps to understand the forces that drive human behaviour.

- **Antecedents**

An antecedent may be a person, place, thing, or event coming before behaviour (Daniels in Mwita, 2000). It is an important part of the ABC model to get behaviour started. It prompts you to take action. Examples of antecedents include policies, goals,

directives, announcements, objectives, incentives, packages, standards, rules, regulations, meetings etc.

Daniels (in Mwita, 2000) recommends three powerful classes of antecedents:

- Those that clearly describes expectations and desired performance
- Those have a history of being associated with a specific consequence
- Behaviours occurring just prior to the desired performance
- **Behaviours**

This is a pin-point and is a specific description of performance that refers to any action of a person or an outcome, the performer produces (Daniels in Mwita 2000). The pin-point helps to measure and determine the performance process.

- **Consequences**

Consequences are events that follow behaviour. There are four behavioural consequences. Two of these, positive reinforcement; that is getting something you want and negative reinforcement; that is, avoiding something you don't want increase behaviour and the other two, getting something you don't want-called punishment and failure to get something that you do want- called extinction, decrease behaviour.

2.2.5.2 Balanced Scorecard

The balanced scorecard (BSC) is a management model, which is used to translate an organisation's mission and strategy into a comprehensive set of measures that, provides the framework or a strategic measurement and management system (Chen et. al 2006).

The three elements of BSC are:

- Formulation of goals

- Employee and middle management participation in the goal formulating process
- Feedback of results

BSC has a great role in private business sector. According to Johnsen (2001) (in Chen et. al 2006), BSC can work in public management sector also. It presents relevant option to widespread management problems as strategy and policy implementation and organizational control and accountability. Its managerial applications include:

- It is a versatile tool for developing, discussing and selecting the most decision relevant performance indicators in complex organizations.
- BSC provides a practical approach the basic premise in information economics: the benefit of information should exceed costs. It is achieved by discarding few performance indicators
- It helps to educate busy stakeholders, managers and employees in complex organisations.

The three managerial applications such as providing decision relevance; reducing performance indicator proliferation and educating users are very important issues for implementing stakeholder decisions in management (Chen et. al 2006).

Performance management and evaluation have become the focus in recent years (Storey, 2002 in Chen et. al 2006). Tools like Balanced Score Card (BSC) are introduced to improve business competitiveness. Educational institutions can learn from this.

The BSC enables business to transform its overall organizational strategy into effective management. The BSC is a performance measurement system, a strategic management system and a communication tool (Kaplan and Norton 2001a; and Niven 2002; in Chen et.al. 2006). It provides performance measure indicators (PMIs) to measure the achievement of strategic targets (Chen et.al. 2006). According to Chen et.al. (2006) these measures are:

- Financial perspective: this is a strategy of growth, profitability, and risk from the perspective of the shareholder.

- Customer perspective: this is a strategy of creating value and differentiation from the perspective of the customer.
- Internal process perspective: the strategic priorities for various business processes create customer and shareholder satisfaction.
- Learning and growth perspective: the priority from this perspective is to create a climate that supports organizational change, innovation and growth.

The four major perspectives of the BSC can be adjusted according to the individual needs of the organization (Lawrence and Sharma, 2003; Wilson et.al. 2003; Kaplan and Norton, 2001 a. in Chen et. al. 2006).

The introduction of BSC will create a cause-and-effect linkage. This will involve feedback from staff members and communication from corresponding functions. Kaplan and Norton (2001a. in Chen et.al. 2006) put forward five basic principles as part of strategic core of an organization:

- Translating the strategy to operational terms
- Aligning the organization to the strategy
- Making the strategy part of everyday job
- Making strategy a continuous process
- Mobilising change through leadership

Performance measures are the core of the BSC system. Performance measure indicators (PMIs) are used to assess the achievement of strategic targets and to ensure that the overall strategic operation is workable (Chen et. al. 2006). In the educational sector, each school will need to establish its core competencies on the basis of its mission and vision and will also need to consider its current resources and the competitiveness (Chen, et. al. 2006). By emphasizing missions and visions, schools can learn from business and pay more attention to educational costs and benefits in implementing performance management (Chen et.al 2006).

Chen et.al (2006) conclude their study by stating that BSC is a performance management system and a strategic management tool. It can help to increase educational quality and create advantages in terms of national competitiveness.

2.2.5.3 360-degree appraisal

The 360-degree, or multi-rater, system of carrying out employee evaluation is a questionnaire that asks many people (supervisors, peers etc) to respond to questions on how well a specific individual performs in a number of areas. The combination of these multiple perspectives offers a more balanced point of view on the employee's overall performance (Nel et al 2001).

360-degree feedback is a multi performance appraisal (McCarthy and Garavan 2001). This plays an important role in numerous organizational activities such as career development, motivation, job satisfaction, and performance management. This is a multi rater feedback and is used to facilitate performance feedback.

360-degree feedback is a performance appraisal approach that relies on the input of an employee's superiors, colleagues, subordinates etc. McCarthy and Garavan (2001) explain 360-degree feed back as an approach that gathers behavioural observations from many layers within the organisation and includes self-assessment.

In striving for quality excellence, 360-degree feedback acts as a powerful source of information. This provides an opportunity for customers and suppliers to give feedback on various desired quality dimensions within the organisation. Total quality Management (TQM), with its emphasis on quality and customer satisfaction, acted as a driving force in the development of 360-degree feedback (McCarthy and Garavan, 2001).

360-degree feedback has become more popular and adopted by more organizations. McCarthy and Garavan (2001), on 360⁰ feedback or multi-rater performance appraisal, conclude by identifying the issues pertaining to the use of multi-rater feedback as a tool for performance and career development. Feedback is an important component of an effective performance improvement strategy. McCarthy and Garavan (2001) presented a review of research on the nature and value of 360⁰ feedback and its implementation. In the latter part they focus on the rating sources, namely, upward feedback provided by subordinates, peer feedback and self-appraisal.

Finally they discuss implication for the performance management process and employee development practices in organizations.

Jones and Bearley (1996, in McCarthy and Garavan, 2001) refer to 360⁰ feedback as the practice of gathering and processing multi-rater assessments on individuals and feeding back the results to the recipients. Many authors have defined 360⁰ feedback and used different terms to refer to this (Yukl and Lepsinger, 1995; Tornow, 1993; Hoffman 1995, in McCarthy and Garavan, 2001) which include:

- Stakeholder appraisal;
- Full-circle appraisal;
- Multi-rater feedback;
- Multi-source assessment;
- Subordinate and peer appraisal;
- Group performance appraisal;
- Multi-point assessment; and
- Multi-perspective rating.

There are varying forms of the 360⁰ feedback process, such as 270⁰ feedback or 180⁰ feedback and 540⁰ feedback (McCarthy and Garavan, 2001).

There are a number of important differences between 360⁰ feedback and the more traditional appraisal process. The most salient difference between these two processes is that there is only one rating source in the traditional approach and the 360⁰ feedback approach utilizes a number of rating sources (McCarthy and Garavan, 2001).

Many researchers have conducted empirical studies to support the advantages of 360⁰ feedback. According to these studies it is accepted that multi-source appraisal enhances two-way communication (London and Beatty, 1993; Garavan et.al., 1997; Bernadin and Beatty, 1987 in McCarthy and Garavan, 2001), and can point to important performance dimensions and convey organizational values to employees (London and Beatty, 1993 in McCarthy and Garavan, 2001). As the feedback data

comes from a number of sources, it will be more valid, fair and reliable (McCarthy and Garavan, 2001).

There were productivity improvements among university faculty and improved customer satisfaction ratings following the implementation of 360⁰ feedback; helps to identify strengths and weaknesses; functions as a more effective system of feedback if an organization has subordinate appraisal or peer appraisal (McCarthy and Garavan, 2001). Handy et.al. (1996 in McCarthy and Garavan, 2001) study found 75 per cent of respondent organizations and 92 per cent of managers, judge it to be successful.

2.2.5.4 Management by objective (MBO)

Management by objective offer supervisors an opportunity to formulate objectives together with the subordinates, and measure performance against these objectives. The MBO technique provides for an initial goal-setting phase, based on the formation of long-range organisational objectives that are cascaded through to departmental goals, and finally individual goals (Nel et al 2001). The goals are set mutually by the employee and the manager. The aspect of joint participation in goal-setting is one of the major strengths of MBO technique.

The most important dimensions of managing people by objectives are:

- A formal relationship in which responsibilities between supervisors and subordinates are clearly defined
- The supervisor's role in removing obstacles to the employee's productivity.

The MBO model is based on three major aspects namely:

- Formulation of goals
- Employee and middle management participation in the goal formulating process
- Feedback results

As part of the MBO approach, employees are encouraged to participate in developing work objectives and goals and in evaluating their own performance against these objectives and goals (Edwards and Ewen 1996 in McCarthy and Garavan, 2001).

2.2.5.5 Behaviourally anchored rating scales (BARS)

The behaviourally anchored rating scale uses critical incidents to serve as anchor statements on a scale. This was developed by Smith and Kendall (in Gerber et al 1996) to reduce or eliminate the bias of subjective performance measures.

2.2.5.6 Systems analysis (SA)

System analysis is described as the organized step by step detailed procedures for the collection, manipulation and evaluation of data about an organisation for the purpose not only for determining that must be done, but also to improve the functionality of the system (Skidmore in Mwita,2000).

The performance management model is systemic in approach. Managers can adopt the principles of System Analysis Theory (SAT) to link primary and secondary objectives of an organization (Birch in Mwita, 2000). SAT is holistic in nature and public sector organisation can also adopt its philosophy.

In addition to the different appraisal techniques, review by peer contributes a great deal in performance appraisal.

2.2.5.7 Peer review

Various terms are used to convey the process of review appraisal. According to Blackmore (2005), the process of peer appraisal has been variously described as “peer review” “peer evaluation” and “peer support review” and so on in order to make appraisal appear less threatening.

Peer review is an essential process for reviewing ideas, identifying mistakes and improving the quality of product. Roberts (2002 in Blackmore, 2005) argued that

performance appraisal in any form was a controversial human resource technique. Therefore, according to Blackmore (2005), participatory performance appraisal such as peer appraisal or review was essential in ensuring an ethical evaluation of performance.

Peer review is a process that provides methods to help each other to improve performance. Peer review is a tool for change (Pagani, 2002 in Blackmore, 2005). It provides feedback on the strengths and weaknesses. Peer observation is not a method of measuring quality performance. It has more to do with quality improvement in that its primary aim is to bring about changes in teaching practice (Blackmore 2005).

Quality management is widely introduced into business. Can it also be used in education?

2.2.6. Total quality management in education: problems and issues for the classroom teacher

Crawford and Shutler (1999) analysed the different interpretations of total quality management (TQM) in industry and how it may be translated into the context of education. TQM is attracting increasing attention particularly in the UK, Canada and the USA. The interpretations advocated by Crosby and Deming differ significantly on how to apply TQM in education. Crosby model focuses on achieving better grades, while Deming model focuses on improving the curriculum (Crawford and Shutler, 1999).

The Crosby model suggests that focus should be on the quality of the teaching system employed to educate learners and not on the examination results as such. According to Deming, there must be continual improvements in curriculum itself in order to satisfy the educational needs of the learners. Bonstingl (1992) (in Crawford and Shutler, 1999) suggests that effective training programmes would show teachers how to set goals, how to teach effectively and how to assess the quality of their work with students. Students would then, in turn, be shown how to set learning goals, how to be more effective in their school work, and how to assess the quality of their work.

2.3. An overview of performance management in terms of related literature

Performance appraisal requires performance standards by which performance can be measured. The performance standards must be accurately determined to be relevant to the required work output. These standards must be defined in the form of performance measures that constitute the criteria for appraisal (Gerber et al 1996). Appraisal process needs to be developmental in nature.

Developmental Appraisal is an important component of developing the human potential to the maximum in any organisation/institution both in public sector and in private sector. It may involve goal setting, performance appraisal, compensation / reward, training improvement and development and career advance. The Developmental Appraisal is integrated into Integrated Quality Management System in South African Education System (ELRC, Collective Agreement 2003).

Appraisal systems are seen as key in most established models of human resource management (HRM), and may be directly or indirectly connected to payment systems as well as other components of performance management approaches (Roberts, 1997). However the term appraisal can mean different things in different situations. Randell (1994) highlights formal and informal approaches, which may have a multiplicity of purposes, including: evaluation, auditing, succession planning, training, controlling, development and motivation. Bryman et al. (1994, in Blackmore, 2005) has investigated the use of evaluative and developmental approaches to appraisal. Developmental appraisal focuses on both training to address short-term issues and on long-term career needs. In contrast evaluative approach focuses on managerial control and judgement (Shelley, 1999).

Shelley (1999) investigated diversity of appraisal and performance related pay practices in Higher Education in UK. In their study, all respondents stated that there was a close link between appraisal and staff development and no link with pay. Whilst there was no compulsory link with pay, staff could voluntarily submit their appraisal as evidence in promotion application. Blackmore (2005) notes that in practice most

appraisals used in universities also appear to follow an evaluative approach in addition to a developmental one.

Shelley (1999) concludes that there is some difference in appraisal and performance related pay (PRP). But there is evidence of diversity of practice across the higher education sector. The variety of appraisal and performance related pay (PRP) practice broadly supports Thorne and Cuthbert's (1996) divergence and convergence thesis. Shelley (1999) recommends that the issue of sustainability needs consideration.

2.3.1. Training Needs Analysis: flaws inherent in the application of conventional performance appraisal techniques.

Michael & Murray (1997) analyse the training needs and identifies the weaknesses in the conventional approach of appraisal. The training and development of administrative support staff is unduly and unhelpfully influenced by both management whim and by the flaws inherent in the application of conventional appraisal methodology. Michael & Murray (1997) further suggest that in order to determine training and developmental needs effectively, techniques need to be devised which combine analysis at a number of different levels. Michael & Murray (1997) present a conceptual model and proposes behavioural expectation scales as tenable mechanisms for facilitating gainful diagnosis and constructive needs analysis.

A range of investigative techniques for improving the effectiveness of training needs, which is a process of information gathering and analysis are advocated. From the performance appraisal process employees' performance figures and the knowledge, skills and abilities of the individual are commonly identified. As reflected by the survey by Long (1986 in Micael and Murray, 1997), remedial elements of appraisal mechanism (e.g. to assess training and developmental needs and to improve current performance), maintenance elements (e.g. to assess training and developmental needs and to review past performance and developmental elements (e.g. to assess training and developmental needs, to assess future potential and to assist career planning decisions) are important components of the needs analysis process.

The remuneration feature is commonly linked between the need to help improve current performance and set performance objectives. Long's (1986 in Michael & Murray, 1997) survey illustrates that the performance appraisal process is increasingly utilised for reviewing past efforts and setting performance objectives, while at the same time being employed to assess training and developmental needs.

2.3.2. Objective setting and performance appraisal

The overall organizational mission and objectives are established and communicated downwards through the organizational hierarchy. Supervisors and subordinates analyse the organizational objectives from the perspective of their work units and jobs and establish goals for their respective functions. They rank goals in order of importance and then, in turn, mutually agree on the accomplishment of specific goals that are observable, can be defined in measurable terms, and have a time constraint (Michael & Murray, 1997).

Plans are developed that describe the actions that will be taken to achieve the identified goals within the constraints of available resources. Supervisors and subordinates monitor progress through the goal achievement period and at the end of the period, measure the degree of goal achievement in a performance review session.

Thus the parameters for performance appraisal are established. At this stage the goals of the process should be clear. Its intention should be diagnostic, aimed at discerning, maintaining and enhancing individual, group and organizational competence.

2.3.2.1. Service quality and performance measurement

It is important to capture and measure a service at its point of delivery, rather than after the event, in order to ensure reliability (Blackmore 2005). In the management of service quality, organizations need to have in place appropriate mechanisms for measuring and monitoring the success of the service offered. Dale (2003) argued that it was critical that an organization had in place systems to monitor and measure

success of delivery. Inspection is one of the methods to do this. A supervisor monitors the performance, i.e. performance appraisal (Blackmore, 2005).

Deming, the father of modern quality management, argued that performance appraisal served only to de-motivate staff rather than lead to any improvements (Blackmore 2005). According to Deming, performance appraisal “nourishes short-term performance” rather than any long-term planning improvements because it focused on the end product only (Blackmore 2005). Given that students are the direct receivers of the delivery of the teaching service, the student experience and its improvement should be at the forefront of any monitoring.

2.3.3. Summary appraisal and the MBO process

According to Michael and Murray (1997), in performing a “summary person” analysis, a judgmental evaluation is undertaken which attempts to classify the employee as a successful versus unsuccessful performer. The data provides a measure to rank the employees.

The ranking or grading individuals may be inadvisable inasmuch as:

Ranking may be an inappropriate mechanism for comparing the members from one group with those from another. A comparatively low ranked employee in a high performing group may be superior to a high-ranked employee in an average group. Comparative ranking positions may suggest vast difference in performance, which in actuality may be minimal. The ranking technique may utilise an insufficient number of behavioural dimensions. Ranking can stimulate intra-group hostility. Tasks may be performed through group interaction, thereby making it difficult to evaluate an individual’s contribution accurately.

Michael & Murray (1997), point to an “activity trap” which illustrates a further weakness in any MBO-based appraisal process that is inclined towards “summary” assessment. There is an inclination by participants to over-emphasise areas where goals are known to be monitored. A tendency for the “easily measurable” to become important rather than “measuring the important” (Michael & Murray, 1997)

There is a tendency of appraisal practices being typically judgmental and obsessed with classifying the individual as a successful versus unsuccessful performer. Long's (1986 in Michael & Murray, 1997) survey illustrates the dichotomy between the "summary person" analysis and "diagnostic person" analysis. It reveals that the performance appraisal process is increasingly used for reviewing past efforts and setting performance objectives, while at the same time being employed to assess training and developmental needs. This brings in undesirable concerns and inaccuracies into appraisal process. This questions the effectiveness as a determinant of developmental needs. It is necessary to integrate all levels of analysis in order to unify individual and organizational goals.

Michael and Murray (1997) advise that "summary person" analysis should be removed from the performance appraisal mechanism, thereby excising judgmental and perceptively threatening aspects from the process. Thus, the MBO procedure should be concerned with the "diagnostic person", specifically exploring the reasons underlying the individual performance based on which training and development interventions can be devised (Michael & Murray, 1997). There are a number of methodologies for accomplishing analysis at the "person" level.

2.3.4. Bias and concern within the appraisal process

Apart from MBO other methodologies like performance appraisal, surveys, critical incidents, assessment centres, psychological testing, skills inventories and coaching are appropriate techniques suitable for appraisal process. There needs to be a balance between developmental objectives and administrative goals to avoid the bias, which will influence group prestige and team motivation. Michael & Murray, 1997) posit that the purpose for which appraisal information is intended to be used affects the manner in which the information is organised. The observer may tend to organise the data in terms of the appraisee's traits. Consequently, Woehr and Feldman (1993) suggest that the relationship between memory and judgment may be driven by contextual factors existing at the time ratings are required, as well as at the time information is encoded. This may make the analysis biased. If appraisal programmes

are used for both salary determination and personal development such errors will compound the bias (Michael & Murray, 1997).

2.3.5. Rater Affiliation

The rater affiliation effect suggests a same-as-me or different-than-me bias. Such affiliations may be based on gender, race, age, personality, education, status, organizational experience, etc... In an experiment conducted by Goldberg (1986 in Michael & Murray, 1997)) the female authors were down-rated by both male and female undergraduates. But Seymour and Voss (1988 in (Michael & Murray, 1997)) did not find significant variance between men and women in female dominated fields, while in male-dominated fields there was a high degree of prejudice by women against women.

As with other affiliations, racial similarities or differences have less influence on the appraisal process than qualitative measures of ability, education and experience (Waldman and Avolio, 1991 in Michael & Murray, 1997).

2.3.6. Special relationships and the appraisal process

- **High leader-member exchange relationship (high LMX)**

A distortion of judgement might occur when a similarity in personality between the appraiser and appraisee facilitates a high LMX (Duarte et al., 1993).

- **Self-fulfilling prophecy**

A link between the prior expectations of the assessor and self-fulfilling prophecy, which relates to a form of bias, is demonstrated by Rosenthal and Jacobson (1968, in Michael & Murray, 1997)), and Snyder (1982, in Michael & Murray, 1997). They suggested that pre-appraisal knowledge could positively or negatively influence the relationship and therefore introduce irregularities into the analysis.

Consequently an ideal methodology should perhaps recognise the inevitability of biases and diagnose appropriate training interventions. Task objectives may therefore be negotiated and established within an informal team-briefing framework, while the needs analysis process can be based on the superior's expectations of employee performance.

2.3.7. Needs analysis

In the opinion of Michael & Murray (1997), needs analysis should essentially be undertaken at three levels—i.e., the organization, the task and the person, if meaningful conclusions are to be reached.

2.3.7.1 Needs analysis at the organizational level

Needs analysis at the organization, task and person level can be integrated to provide an effective training strategy. Katz and Kahn (1978 in Michael & Murray, 1997) provided the most appropriate focus for this area of analysis. They suggested that organizational effectiveness could be expressed in terms of: goal achievement, increased resourcefulness, customer satisfaction and internal process improvements. Consequently, the needs analysis should explore such features as the goals of the organization, skills resources indices of effectiveness and the organizational climate.

2.3.7.2 Needs analysis at the task level

Michael and Murray (1997) suggest that needs analysis should be undertaken at the task level in order to assess the demands of respective job roles to support organizational and individual goals. Performance standards may be established and phrased as objectives for the job. It describes the conditions, targets, standards and functional measures that represent job achievement.

2.3.7.3 Needs analysis at the person level

Needs analysis should be undertaken at the person level, focusing on how well a particular individual fulfils the activities comprising his or her task role and identifying training interventions that address performance variances and promote employee development (Michael & Murray, 1997).

2.3.7.4 Behavioural anchors in needs analysis

Mabey and Salaman(1995 in Michael & Murray, 1997) observed that training needs analysis often concentrates on the person analysis level. It neglects the links with organizational goals which are necessary to ensure that training is effective in advancing the cause of the company. They further suggested the utilization of behaviourally anchored rating scales (BARS) (concept developed by Smith and Kendall, 1963, in Michael & Murray, 1997) in an effort to overcome weaknesses in the assessment process. For instance, if a task can be broken down into a number of key competencies or performance dimensions, then examples of poor, acceptable, or high achievement may be described for each dimension, thereby offering great accuracy and finer discrimination within the appraisal procedure.

2.3.7.5 Behavioural expectation in training needs analysis

Behavioural expectation scales (BES) is the one in which an appraiser makes value judgements regarding the way that a particular employee would be expected to act in a given range of work-related situations (Michael & Murray, 1997). This translates important performance indicators into behavioural expectation descriptors. Behavioural examples are then defined for each dimension and scaled to illustrate progressive levels of performance ranging from the unacceptable to the superior. However, Michael and Murray (1997) warn that BES approach is essentially subjective and the process might consequently encounter hostile resistance if adopted for purposes other than training and development.

2.3.8 The role of appraisal coordinators

Hellawell (1997) interviewed three appraisal coordinators of Local Education Authorities (LEAs) in England. The study explains the limitations of the functions of the coordinators, appraisal schemes and the differences in appraisal procedures and funding issues. The implications of this study will highlight the anticipated implementation problems of appraisal system in South Africa.

The coordinators, in addition to their overall responsibility to appraisal coordination and appraisal training, took an active part in the appraisal process by being involved with schools as the 'pastoral inspector' who was one of the appraisers of the heads in the schools concerned. According to the coordinators in none of the three LEAs did there appear to be an LEA 'appraisal team'. The impression given by Barber et al. (1995, in Hellawell 1997) is that such teams are quite common. But Haynes (1996, in Hellawell 1997), argues that: 'While the impression given in Barber's report is that LEAs, in general, are responding in a positive and comprehensive manner to their role as 'appraising body', evidence suggests a much more uneven response across England'.

The appraisal coordinators were unable to fulfil their statutory obligation but did their best in the given circumstance. There were divergences between the appraisal procedures, from the stated regulations. The reason for this breach of the statutory regulations seems to be lack of sufficient resources. The national funding was stopped and the schools had to find the finance for appraisal (Hellawell, 1997)

The teacher associations wanted the appraisal to continue because the professional development link was so strong. The political statements made, were interpreted appraisal as a means of weeding out the incompetent from the profession, made many in schools to see this as part of a more aggressive approach to the profession.

There was apprehension among the coordinators that the ending of earmarked funding by central government and the devolution of education budgets to schools could lead to a downplaying of appraisals in schools and ultimately its demise (Hallawell, 1997).

2.3.9 Performance management as a scientific management system

Performance management is explained by Daniels of Aubrey Daniel International (ADI) (Daniel, 2000,) as a way of getting people to do what you want them to do and to like doing it. Performance management is a scientifically based, data oriented management system.

According to Amaratunga and Baldry (2002), performance management consists of three primary elements

- Measurement
- Feedback and
- Positive reinforcement

These three elements have to be present to conduct an effective performance management. Together with these elements performance management performs the following important functions:

- Capacity planning and modelling
- Service level management and
- Application management

2.3.9.1 Measurement

Measurement allows knowing whom and when to positively reinforce. From the data collected, a baseline is established. By this the current performance is identified so that improvement in performance can be brought about. Performance measurement has to have some important attributes, namely

- being sensitive to changes in the internal and external environment of an organisation
- reviewing and re-prioritising internal objectives

- developing changes to internal objectives and priorities to critical parts of the organisation, thus ensuring alignment at all times
- ensuring that gains achieved through improvement programmes are maintained (Amaratunga and Baldry, 2002)

Measurement helps to assess the progress of the predetermined objectives, identify areas of strengths and weaknesses and to decide on future improvement initiatives. The management development programme of an organisation needs to integrate performance management and feedback (Amaratunga and Baldry, 2002)

2.3.9.2 Feedback

Feedback is the degree to which the job or employer provides the employee with clear and direct information about job outcomes and performance (Martocchio 2004). Feedback is the sharing and discussion of outcomes on the basis of the data collected during the process and it helps to monitor the performance. In performance management processes that rely on regular feedback and review, the annual review should be a lighter process – a ‘no surprises’ summary of achievements over the year and the beginning of a new performance agreement or contract (Armstrong and Murlis 2000). If an employee is not performing up to the full capabilities the performance can be enhanced by proper coaching and guidance.

Guiding an employee can be done by the Four-Step Process (Armstrong and Murlis, 2000):

- determining motivation
- measuring current performance
- implementing steps to increase performance
- rewarding excellent performance

Feedback can enable an employee to readjust their actions to improve performance. Absence of proper feedback can lead to under-utilisation of an employee and hinder the progress of an organization.

2.3.9.3 Positive reinforcement

Reinforcement theory suggests that successes in achieving goals and rewards act as positive incentives and reinforce the successful behaviour which is repeated the next time a similar need arises (Armstrong and Murlis, 2000). It is the appropriate recognition of improved performance. This reinforcement must be frequent and meaningful.

Scientifically based management system refers to a system based on laws of human behaviour. Performance management provides organizations with an opportunity to modify and improve their development activities.

In South Africa, in the present rapidly changing time, the organizations have to set up mechanisms to increase productivity to be competitive internationally. Spangenburg (1994) suggests that the adoption of performance management as a process changes the management culture of a business to one that is more suited to the new environment, which will pay huge dividends in the long run.

Evaluating performance is but one part of a performance management system. Evaluating or appraising performance is not the same as performance management. If inadequate people-management skills and organisational issues that impede performance management can be overcome, the system could make a significant contribution to employee and organizational growth and effectiveness.

According to Armstrong (2000), the philosophy of performance management is based on the belief about how performance should be managed. It involves the inputs, processes and outputs.

Inputs are what employees bring to the job in the form of knowledge, skills, expertise and competence. Process is how they behave in carrying out their work. Outputs are the results they obtain in terms of achieving objectives and the influence or impact they have on the efforts of their team, their department and the organisation as a whole.

Two initiatives launched in 1992, at University of Stellenbosch Business School shed some light on problems experienced with performance management and prerequisites for the success of the system. A system model of performance management, as well as an Organisation Development (OD) implementation plan was also developed.

The purpose of the system model is to serve as a conceptual framework for understanding the Performance Management process and its complexities. It could also serve as framework for testing whether key inputs, processes and outputs are taken care of during implementation (Spangenberg, 1994).

2.3.9.4 Performance management as a process of management

Performance management is strongly influenced by the belief that it is a natural and core process of management (Armstrong, 2000). Its emphasis on analysis, measurement, monitoring performance and planning and coaching for performance improvements means that it is concerned with basic aspects of people management practice.

2.3.9.5 Managing expectations by agreement

Performance management is based on agreed definitions of the contribution employees are expected to make in achieving the purpose of their team, department or function, and of the organization as a whole. The management of expectations is a joint affair requiring managers, teams and individuals to act in partnership.

2.3.9.6 Performance management as an integrating process

Performance management involves the interrelated processes of work, management, development and reward. It can become a powerful integrating force (Armstrong, 2000)

2.3.9.7 Performance management cycle

Performance management is described as a natural process of management rather than a separate performance appraisal event orchestrated by the personnel department (Armstrong, 2000). Therefore performance management process, operate as a continuous management cycle which consists of:

- planning
- acting
- monitoring and
- reviewing

Various ways can be identified in which performance management can be put into practice. This information is explained in a survey referred by Armstrong and Baron (1998, in Brown, 2005).

2.3.10 Fundamental questions about performance management

When considering the introduction of performance management and possibly linking it to pay the following questions arise (Armstrong, 2000):

- Can good or poor performance be identified?
- Can the causes of good or poor performance be established?
- How should good performance be rewarded?
- Can all this be done fairly and consistently?

Organisations deal with the answers to these and related issues, including the use of 360-degree feedback as a basis for measuring performance and the choice of performance measures (balanced scorecard).

In a comprehensive survey on performance management practices conducted (Armstrong and Baron 1998, in Brown, 2005), out of 562 organisations, 388 (69%) operate formal processes to manage performance. Of the 31% who do not operate formal processes, 48% have definite plans to do so within the next two years and a further 25% are undecided. Only 11% have no plans to implement formal performance management processes.

In this particular survey the most important features of performance management employed were:

- Objective setting and review and
- Annual appraisal

The response to the questions based on the effectiveness of each key feature is summarized in table 2.1.

TABLE 2.1: THE EFFECTIVENESS OF KEY FEATURES OF PERFORMANCE MANAGEMENT

	Very effective %	Mostly effective %	Partly effective %	Not effective %	No comment %
Objective setting and review	27	48	18	2	5
Annual appraisal	7	59	28	2	2
Self appraisal	22	43	30	2	3
Performance- related pay	6	36	37	14	7
Personal development plan	19	40	31	3	7

The results in this survey (Table 2.1) indicate that objective setting and review, annual appraisal, personal development plans and self appraisal are all strongly endorsed. Performance related pay was not endorsed as effective (Armstrong 2000).

2.3.11 Performance appraisal leading to performance management

Performance appraisal is the process by which an individual's work performance is assessed and evaluated. Using performance appraisal the organizations establish measures and evaluate individual employees' behaviour and accomplishments for a finite period of time. It answers the basic question, "How well has the employee performed during the period of time in question?" (Bacal, 1999).

According to Bacal (1999) appraisal will only form one part of performance management. Performance management involves planning, diagnosing problems, identifying barriers to performance, and development of staff. Performance management differs from traditional performance appraisal systems in its contextual positioning in the organization. Performance appraisal process has many flaws and false assumptions inherent in it. This makes it necessary to have a paradigm shift.

2.3.12 New trends in educator appraisal

The performance appraisal process was concerned with performance of employees to the extent which they achieved in their objectives. The mode of understanding has its origin in the early management thinking, in which control was perceived to be one of the most important functions of management (Fidler & Cooper 1992). Early attempts at educator appraisal are viewed as representing an autocratic philosophy of supervision. By this educators were seen as appendages of management and as such were employed to carry out pre-determined duties in accordance with the wishes of the management (Sergovianni & Starrat, 1998). Many authors on this subject have described appraisal as being bureaucratic, closed and authoritarian (Rasool, 1997, Davidoff and Lazarus, 1997, Squelch and Lemmer, 1994). One of the weakest areas in education in South Africa has been the appraisal of educators for various reasons (Davidoff & Lazarus 1997). The reason for this is considered to be the way the evaluation was managed in top-down, hierarchical manner. This has been seen as a way of maintaining control and keeping surveillance over educators.

Negative attitude to appraisal is not only a phenomenon unique to South Africa. Teachers throughout the world do not like to be evaluated (Zynoe, 1995). However,

South African teachers have a particular resistance to and suspicion of being appraised. In the past evaluation was used as a means of control and not as method leading to development.

School inspectors and principals would visit the lesson of educators and observe their lessons. The record and comments are made about the teacher without having an input or knowledge of the teacher (Quinlan and Davidoff, 1997). The department of education keeps such records. It was never used for developmental purpose. No feedback was given to the teacher and thereby denying any opportunity for improvement of performance. The criteria used for the evaluation was very weak to serve the purpose of performance measurement. This type of evaluation was purely summative, judgmental exercise to pinpoint the wrong doing of educators and degrade accordingly. Evaluation was used for promotion purposes thereby maintaining a control mechanism over teachers.

2.3.12.1 Teacher education policy in South Africa

Teacher educators in a post-apartheid South Africa are being asked to re-conceptualise and re-design their pre-service teacher education programmes to respond to national policies on teacher education. A sample of teacher educators from various teacher education institutions was interviewed about their understanding, support for and implementation of the new policy and the problems they have faced in making it a reality (Robinson, 2003). A potential tension between reform through legislation and reform through personal and institutional vision-building exists.

The concept of quality assurance control has emerged as a primary instrument for evaluating performance and accountability in education (Kistan 1999). Kistan discussed the origins and nature of quality assurance in South Africa, particularly in Higher Education. In analyzing the conceptualization of quality in a South African perspective, Kistan argues that quality and assurance of quality are important for the maintenance and enhancement of education. Strydom (1995) (in Kistan, 1999) comments that the concept of quality does not necessarily lend itself to a straight forward interpretation. Just as in the case in many countries, South Africa is also discussing quality, quality assurance and self-evaluation (Kistan 1999). Quality

assurance has almost singly contributed to the transformation of the higher education sector in many countries, especially India, the UK, Chile and the Netherlands (Kistan 1999).

2.3.12.2 Performance appraisal in UK

Gunter (2002) reports on a research project in one urban Local Education Authority (LEA) in the north of England. In this study evidence shows how the LEA sought to establish and sustain a developmental model of teacher appraisal in an increasingly hostile climate. Developmental appraisal largely failed because of lack of resources and it was increasingly out of tune with the performance management strategy.

Shelly (1999), concludes on the 'diversity of appraisal and performance-related pay practices in higher education' in the UK higher education that the diversity needs to be managed in a more proactive and strategic way in the future.

Brown (2005) provides an overview of the various ways in which performance management is being implemented in England's primary schools. Brown's study was conducted adopting a triangulation approach. This included in depth audio-taped interviews, documentary analysis of the relevant publications on performance management and observation of the process. The findings of this research focused on different aspects of performance management. These included:

- The meaning and purpose of performance management in primary schools;
- Education and training for performance management;
- Formulation and content of performance management objectives;
- Measuring the performance of heads and teachers;
- The effects of performance management on teacher' professional development; and
- The appropriateness and reality of performance related pay (PRP) (Brown 2005).

While providing an overview of the various ways in which performance management is being implemented, Brown (2005) is concerned with the effectiveness to improve the quality of primary education in England. Based on the opinions of the head teachers, deputy heads, teachers and school governors he concludes that performance management can, under certain circumstances, help to improve the quality of primary education (Brown, 2005)

The United Kingdom (UK) has recently published secondary education value added measures (Rodgers 2005). Individual schools receive different “quality of student intake and therefore, to measure school performance there needs to be an adjusted measure taking into consideration individual student differences. After a pilot study covering 495 schools, national value added tables were published (Rodgers, 2005).

Value added is attempting to identify the progress in a student’s performance that can be attributed to the quality of an institution’s teaching. Rodgers (2005) argues that the measure should distinguish between “exogenous” performance-influencing characteristics of students (over which the institution has no control), and their “endogenous” performance-influencing characteristics (which depend on the teaching performance of the institution). Any credible measure of value added will need to control for all the “exogenous” performance influencing variables, not just academic ability. This study was examining whether the approach used could also offer possible method of measuring value added in higher education. Rodgers, (2005) concludes the study by stating that the techniques used in UK secondary education cannot be applied to higher education.

The results of a survey undertaken by Duckett (1991, in Timperly, 1998) of volunteers in a pilot appraisal scheme in the UK, reflected much of the opinion expressed in the literature on the effectiveness of performance appraisal (Timperley 1998). 50% of the appraisees involved in the scheme believed appraisal to be good idea, but only 25% of them thought the scheme itself was very or fairly successful.

2.3.12.3 Performance Appraisal in USA

In the United States of America, appraisal of educators has undergone different stages. However this tendency was gradually replaced. It was believed that each educator should develop his or her own particular style.

At a later stage certain personality traits were prescribed as being related to excellence in teaching. Stenhouse (in Smith 1995) criticized this view by stating that it failed to include autonomy and the ability to scrutinize critically and questions one's own teaching.

During 1960s and 1970s, the emphasis was on generic teaching behaviour that would be effective in all instructional settings. This led to the licensing the teachers on the basis of competence and performance rather than the completion of an accredited teacher education programme. By this the appraisal process continued along the summative lines. Assessment was carried out by a team of experts, using approved methods of appraisal such as observation schedule and knowledge tests (Turner and Cliff, 1988).

Performance appraisal and its United States equivalent, teacher evaluation have become much criticized developments in schools (Timperley, 1998), especially the way it has been implemented. Generally the outcomes are negative, although some schemes report positive outcomes (Mortimore and Mortimore, 1991, in Timperley, 1998). Incompetent teachers are reported to remain unidentified (Lavelly et al., 1992, in Timperley, 1998) or receive consistently inflated evaluations of their teaching competence (Frase and Streshly, 1994, in Timperley, 1998). Some schemes are described as ritualistic and are largely a waste of time (McLaughlin, 1990, in Timperley, 1998), while others are judged to have little influence on decisions about personnel, staff development, or the structure of teaching (Darling-Hammond, 1990, in Timperley, 1998).

2.3.13 Summary

In Chapter 2 theoretical foundation of performance management which comprises of different aspects of performance measures are discussed. Related literature on the topic is provided at the latter part of the chapter. The chapter is concluded by describing performance appraisal conducted in U.K. and in USA for comparison.

CHAPTER THREE

PROBLEM STATEMENT AND RESEARCH QUESTIONS

3.1. Introduction

South Africa's transition from apartheid and minority rule to democracy required a radical shift in the direction and vision of the education system. The existing practices, institutions and values had to be re-thought in terms of their fitness of purpose for the new era. The new priorities concentrated on achieving equitable access to education and improving the quality of its provision. The Minister of Education, S.M.E. Bengu stated:

“Our message is that education and training must change. It cannot be business as usual in our schools, colleges, technikons and universities” (Department of Education, 1995)

Improving quality of learning requires a strategy that focuses on fundamental changes, growth and development of schools. In order to address the existing challenges the government had to re-institutionalise school supervision and monitoring evaluation. Just as in the case of many countries, South Africa was also considering implementing quality, quality assurance and self-evaluation in education. This necessitated the transformation in policies in order to facilitate quality in education. Applying the principle of quality entails evaluating services and products against set standards, with a view to improvement, renewal or progress (Department of Education 1997a).

Prior to the new government coming into office in 1994, there were nineteen different systems within different department. Inspection in the pre-1994 era started out as quality control, but soon lost direction. This process did not serve the purpose of

professional development of educators and quality education at schools. It rather legitimised victimisation and favouritism. The inspectors were regarded as dishonest and only serving the interests of the then-government. The process had no legitimacy.

The Tirisano Programme and its implementation aim to raise quality standards promote accountability and improve learner achievement levels. The government tries to promote increased parental and community involvement, fighting to keep the schools safe and free of abusive substances, enhancing teacher support and development, and rewarding excellence in teaching through our special teachers' award programme (Minister Asmal, speech on the Launch of National Policy on Whole School Evaluation/WSE, June 2001).

While it may be true to say that the definitions of quality assurance are vast and confusing, the process has brought with it a drastic mind shift, a refreshing dimension to what one is doing and for what purpose (Kistan, 1999). It is clear that accountability and value for money underline the policy of quality in South Africa. The need for quality assurance and "value for money" concept become imperative due to the competitive marketplace.

3.2. Rationale to the problem

Post apartheid South Africa has introduced several policies and strategies to ensure quality education. The latest among these is the Integrated Quality Management System (IQMS), which is a combination of Developmental Appraisal, Performance Measurement and Whole School Evaluation (ELRC, Collective Agreement, 2003). This system in its entirety allows classroom practitioners to identify their own development needs through a democratic and formative process. It involves the participation of education managers, peers and experts. Quality of education can be revolutionised if properly implemented.

Performance appraisal and teacher evaluation systems in schools have been subject to criticism in many countries because they have not met perceived requirements of educators and/or the state (Timperley, 1998). The scenario is not much different in South Africa as well. Even though lots of programmes are put in place in an effort by

the government to improve productivity and quality of education, execution and implementation of the policies and processes have been slow and generally do not produce the desired outcome. The implementation of IQMS effectively started in North West Province only during 2005 and in some areas of the Province in 2006.

The WSE and DA were meant to replace the old school inspection system, which was described as an “unconstitutional, unfair, discriminative, fearful, threatening and manipulative” part of Bantu Education Act (The Mail, 10 August 2001).

3.3. Problem statement

The study is to investigate the management of the implementation process of IQMS with specific emphasis on performance measurement (PM). It is envisaged that the study will provide the frame work to identify the weaknesses and strengths of the performance management and consequently IQMS process as a whole.

The effects of IQMS programme, implemented by the Department of Education on the performance of educators in the schools in Mafikeng Area Project (APO) in North West Province are not known. Arising from this primary problem, the following secondary problems have to be analysed:

- What is the effect of performance measurement in the performance of educators?
- How effective is the process of IQMS for developmental purpose and pay progression? and
- Has IQMS really contributed to the improvement of education?

3.4. Formulation of research questions

IQMS which is introduced in order to promote performance of educators without being a threat is worth investigating. In search of the evidence to support the objectives the following research questions can be posed:

- How performance measurement influenced the performance of educators?
- How effective is IQMS, in terms of the performance measurement for developmental purpose and pay progression?
- Has IQMS really contributed to the improvement of education in schools?

3.5. Summary

This section introduced the research problems which form the basis of this study. The researcher endeavours to find answers to the research questions by conducting a thorough investigation into the performance management programme with regard to IQMS. Complementary to the investigation, it is anticipated that the study will throw some light in finding the specific problems in the implementation of IQMS. The following chapter discusses the methodology used to collect data for this study.

CHAPTER FOUR

RESEARCH DESIGN AND ANALYSIS

4.1. Introduction

In chapter three the research problem was stated. Chapter four gives an exposition of research design in general, and follows with a discussion regarding the methodology of this study.

Cooper and Schindler (2004) suggest that “research design constitutes the blue print for the collection, measurement and analysis of data”. Many authors have written and continue to write on this topic. Cooper and Schindler (2004) proposed the essentials of research design.

- The design is an activity and time-based plan
- The design is always based on the research question/s
- The design guides the selection of sources and types of information
- The design is a framework for specifying the relationships among the study’s variables
- The design outlines procedures for every research activity.

The data collected from the school management team (SMT) and educators will provide enough information, in order to make conclusions on the research questions. This will provide a basis to prepare an analysis of and a report on the implementation of IQMS.

4.2. Sampling procedures

The study aims to concentrate on the school management team (SMT), (which include school managers, deputy managers and heads of departments) and educators. The sample consists of these personnel.

4.2.1. Sampling technique

Cooper and Schindler (2004) suggest that the basic idea of sampling is that by selecting some elements of the population, one may draw conclusions about the entire population. In order to achieve this, the samples must be representative of the population.

The members of the sample are selected on a probability basis, or a non-probability basis. The former refers to a selection of sample members where each and every member of the population has a known and equal chance of being selected. The latter refers to the selection of sample members on arbitrary or subjective methods.

There are different sampling methods in use. Simple random sampling involves a selection process that gives every possible sample of a particular size the same chance of selection. The principle of stratified random sampling is to divide a population into different groups, called strata, so that each element of the population belongs to one and only one stratum (Bless et.al. 2006). Then, within each stratum, random sampling is performed using either the simple or the interval sampling method. The samples for this research have been selected according to stratified random sampling.

A stratified random sample will consist of educators and School Management Team, in the Mafikeng Area Project Office.

A very important issue in sampling is to determine the most adequate size of the sample. Sampling can reduce data collection cost and burden on respondents. By selecting a sample of a selected population to respond to a selected sample of survey items can reduce the amount of time and other resources of data collection when compared with a study that requires the participation of all members of the target group. On the other hand, sampling reduces the amount of information available for individual educators and officials and may make it difficult to disaggregate the data.

A stratified random sampling consists of individuals randomly selected from schools. Similarly a simple random sample of schools consists of secondary schools randomly selected from Mafikeng Area Project Office. The number of schools and educators are selected after examining the total number of secondary schools in the Mafikeng APO.

4.2.2. Sample size

The sample consists of School Management Team and Educators of twelve secondary schools of Mafikeng Area Project Office, Central Region, North West Province, South Africa.

4.2.3. Population and sample

A population is an aggregate of all units or cases that conform to some designated set of criteria. Population elements are single members or units of a population; they can be such things as people, social actions, events, places or times (Blaikie, 2004).

A sample is a selection of elements (members or units) from a population and used to make statements about the whole population. An ideal sample provides a perfect representation of a population, with all the relevant features of the population included in the sample in the same proportion.

In this study the population consists of educators, including school managers, deputy managers and heads of departments.

4.2.4. Educators and school management team (SMT)

There are six secondary schools in Tshwaranang (Cluster A), nine in Montshio Stadt (Cluster B), six in Mmabatho (Cluster C), five in Botshabelo (Cluster D), and three in Kopano (Cluster E). There are a total of twenty nine secondary schools and 674 educators in Mafikeng APO. There are a total of 110 management team members.

12 secondary schools under Mafikeng APO were selected. A total of 36 School Management Team members and 125 educators will form the sample. The strata consist of 36 SMT members and 125 educators from the 12 schools chosen by interval or systemic sampling to answer the questionnaire will constitute the sample.

4.3. Data collection procedure

The questionnaires method serves as a major instrument for collecting data for the survey because it best suits the nature and purpose of this study.

The sampling units are educators, randomly selected from twelve of the secondary schools from Mafikeng APO. The educators will include school managers, deputy managers, and heads of departments. These categories of sampling unit will form the population. To select the sample, after choosing twelve schools in the Mafikeng Area Project Office, the number and names of the educators from those schools will be collected. Approximately 20% of the educators will be selected from each school.

Selection of respondents is done by systematic sampling, a form of probability sampling is chosen. Using the number and names of the educators from each school the length of the interval is determined by dividing the size of the population by the size of the sample. In order to select 40 respondents from 110 educators of a school, an interval of 3 is reached and the 40 sample elements will be third, sixth, ninth and so on. Similarly for 140 educators from 674, an interval of 4 is reached and the sample element will be fourth, eighth, twelfth and so on.

4.4 Questionnaire

Questionnaire method best suits the nature and purpose of this study. Questionnaires can be used to explore or describe a situation, but also to assess a correlation between two variables. The questionnaires have structured questions, which will allow the respondents to answer precisely with out difficulty.

Johnson (1994) explained that the experience of pilot respondents is used to improve and amend the questionnaire before sending it out to the main research population. A pilot study of the questionnaires was conducted with a small sample of respondents to make the necessary modification in the questionnaire before it is actually administered. This enabled the researcher in restructuring the questions in order to make it easily understandable. The final sample questionnaire is enclosed in annexure.

Two different questionnaires will be used. The questionnaire for educators (Questionnaire A) will consist of four sections. The first will aim to collect the biographical information of the respondents and the second part will provide a platform for expressing their views about IQMS. The third section will indicate the preference of educator with regards to the appraisers and the last will identify the area covered by IQMS in the opinion of the educator.

The questionnaire for school management team (Questionnaire B) will consist of three sections. The first will aim to collect the biographical information of the respondents and the second part will provide a platform for expressing their views about IQMS. The third section will identify the area covered by IQMS in the opinion of the School Management Team.

Once the questionnaire is filled in the information will be categorised and interpreted using appropriate statistical method.

4.5. Analysis technique

The analysis of data involved organising them into meaningful and manageable units for synthesis. The primary aim was to investigate the effects of performance measurement in the performance of educators, how far it helped for developmental and pay progression as well as the contribution of IQMS towards improvement of education in schools. The result is expected to indicate the sustainability by identifying the importance and functionality of IQMS in the views expressed by the different stakeholders.

Analysis of the data will be done in the following categories:

- **Category of school respondents:**

School Managers

Deputy School Managers

Heads of Departments

Educators

Grouping of the information collected from the data will be based on:

- Respondents' number of years of experience
- Gender of respondents
- Awareness of the programme
- Reaction towards IQMS
- Perceptions about the effectiveness of IQMS
- Beneficiaries of the programme
- Views on the method of improvement

Interpretations are made from the analysis of the data.

4.6. Research limitations

The research is limited to the schools in Mafikeng Area Project Office formerly known as Mafikeng District Education Office. Interviews were conducted with principals and educators of schools in order to gather information on the new integrated quality management system and the use of performance measurement for pay progression and development of educators. A small sample was used in this study. It is expected to represent the views of the majority. Still it may not be representative of the effects of the performance measurement of the wider population of the North West Province.

4.6.1. Validity

According to Cooper and Schindler (2004), internal validity refers to the ability of a research instrument to measure what it is purported to measure, while external validity of research findings refers to the data's ability to be generalised across persons, settings, and times.

The measuring instrument used is expected to provide internal validity and the establishment of the validity of this instrument is beyond the scope of this study. The external validity is also not confirmed, since the sample of this study is limited, and cannot be used to generalise any findings across the population.

4.6.2. Reliability

Reliability is concerned with estimates of the degree to which a measurement is free of random or unstable error (Cooper and Schindler, 2004). Reliability is a necessary contributor to validity, though not a sufficient condition for validity.

In order to improve reliability, this study has minimised external sources of variation. This implies that the respondents and their environment were kept consistent. Further, the study standardised conditions under which measurement occurred.

According to Cooper and Schindler (2004) any measure offers practical value when it is economical, convenient and interpretable. This study was economical and interpretable, and thus offers practical value.

4.7. Summary

This chapter provided a detailed exposition of the methodology that is used to conduct this study. The method of study as well as the method of data collection was described. The sampling method used for this study was then explained which was followed by a full exposition of the limitations affecting this research.

In the next chapter an analysis of data will be presented.

CHAPTER FIVE

RESEARCH RESULTS

5.1. Introduction

Chapter four provided a detailed explanation of the methodology that is used to conduct this study. This chapter synthesises the data collected and presents in a coherent and logical manner to provide meaning and insight into the problem areas.

The data collected from the questionnaires are presented and summarised into tables. From the findings the opinion of the respondents provide answers to the questions in 3.4 of chapter three based on the objectives put forward in 1.3 of chapter one.

The study looked at the factors which influenced the implementation of the whole programme of IQMS. The response from the questionnaires provided the views and opinions of the respondents. By categorising the responses and analysing those data, it was convenient to arrive at conclusions about the findings. These data are categorised and analysed in the following sections of this chapter.

5.2. Analysis of the data obtained from questionnaire A

This questionnaire was distributed to educators. Out of 140 questionnaires distributed 125 were completed and returned. The sample size constituted of 18.5% of a total of 674 secondary school educators in the Mafikeng Area Project Office.

Section A of the questionnaire consisted of biographical data, Section B consisted of questions about the understanding of the purpose of IQMS in the opinion of educators, Section C indicated the appraiser preference of educators and Section D provided the area/s covered by IQMS in the opinion of the educators

These data are tabulated in the following sections.

5.2.1. Respondents' number of years of experience

The table below indicates the experience of educators in the teaching field.

Table 5.2.1 indicates the work experience. Approximately 56% of the respondents fall in the range of 0 to 10 years and the other 44% have more than 10 years of experience.

TABLE 5.2.1 RESPONDENTS' NUMBER OF YEARS OF EXPERIENCE

YEARS OF EXPERIENCE	NUMBER OF EDUCATORS	PERCENTAGE
0-5	25	20%
6-10	45	36%
11-15	25	20%
16 and above	30	24%
TOTAL	125	100%

5.2.2 School respondents' gender

The table below provides a ratio of male and female educators.

TABLE 5.2.2 indicates the gender distribution in schools. The distribution of male and female is approximately equal.

TABLE 5.2.2. SCHOOL RESPONDENTS' GENDER

GENDER	NUMBER	PERCENTAGE
Male	50	40%
Female	75	60%
TOTAL	125	100%

5.2.3 Understanding the purpose of performance measures in IQMS

Section B of questionnaire A consists of responses which indicated how performance measures used in IQMS helps the educators/education in the opinion of the educators. The scale of values used was 1. Strongly disagree, 2. Disagree, 3. Agree and 4. Strongly Agree. The Table 5.2.3.1 and 5.2.3.2 indicates the responses.

Table 5.2.3.1 provides the opinion of educators on the questions answered on the purpose of performance measures used in IQMS.

TABLE 5.2.3.1 PURPOSE OF PERFORMANCE MEASURES USED IN IQMS.

RESPONSE	STRONGLY DISAGREE	DISAGREE	AGREE	STRONGLY AGREE
To improve educators' classroom skills	10	35	39	41
To determine staff development and in-service needs	9	20	46	50
To decide on salary progression	6	12	62	45
To re-deploy educators according to schools' needs and teacher talents	22	28	44	31
To determine whether the policies of the Department of Education are being implemented	15	24	46	40
To motivate educators	32	45	28	20
To fulfil development objectives and plans for improvement envisaged	18	32	45	30

Table 5.2.3.2 provides the opinion of educators in percentages on the questions answered on the purpose of performance measures used in IQMS.

TABLE 5.2.3.2 PURPOSE OF PERFORMANCE MEASURES USED IN IQMS – IN PERCENTAGES.

RESPONSE	STRONGLY DISAGREE	DISAGREE	AGREE	STRONGLY AGREE
To improve educators' classroom skills	8%	28%	31.2%	32.8%
To determine staff development and in-service needs	7.2%	16%	36.8%	40%
To decide on salary progression	4.8%	9.6%	49.6%	32%
To re-deploy educators according to schools' needs and teacher talents	17.6%	22.4%	35.2%	24.8%
To determine whether the policies of the Department of Education are being implemented	12%	19.2%	36.8%	32%
To motivate educators	25.6%	36%	22.4%	16%
To fulfil development objectives and plans for improvement envisaged	14.4%	25.6%	36%	24%

5.2.4 Educators' preference for appraisers

Response in this section C of questionnaire A provided educators' preference for appraisers. The choices of appraisers were given as, school manager, deputy manager,

head of department, colleague/peer, an external educational evaluator, an educator nominated by the administration and the students. The educator had a choice of selecting one appraiser. The table 5.2.4. indicates appraiser preference selected by the educators.

Table 5.2.4 shows that educators preferred a colleague/peer (38.4%) followed by head of department (27.2%) as appraiser;

TABLE 5.2.4. EDUCATORS PREFERENCE FOR APPRAISERS

Appraiser	Choice in numbers	Percentage
School Manager	25	20%
Deputy Manager	18	14.4%
Head of Department	34	27.2%
A colleague/peer	48	38.4%
An external educational evaluator	0	0%
An educator nominated by the administration	0	0%
Students	0	0%

5.2.5. Area/s covered by IQMS

Response to Section D of Questionnaire A provided the area/s covered by IQMS in the opinion of the educators. The areas considered in this section were curriculum, classroom performance, outcomes/national exam results, wider school responsibilities, career aspirations and others. The responses to these and the corresponding percentages are provided in Table 5.2.5 below. The respondents selected more than one area. The analysis will be based on the percentage, even though the total percentage may exceed 100.

Table 5.2.5 provides data to arrive at a conclusion on whether IQMS has really contributed to the improvement of education, in the opinion of the educators of the schools.

Table 5.2.5 indicates that only 9.6% of educators think that IQMS has contributed to improved exam results, at the same time 33.6% supports that IQMS improves classroom performance.

TABLE 5.2.5 AREAS COVERED BY IQMS

Area/s covered by IQMS	Number of responses	Percentage
Curriculum	32	25.6%
Classroom performance	42	33.6%
Outcomes/national exam results	12	9.6%
Wider school responsibilities	18	14.4%
Career aspirations	15	12%
Others	6	4.8%
Total	125	100

Research problem:

- How performance measurement influenced the performance of educators?

64% (31.2+32.8) of the educators are of the opinion that performance measures used in IQMS help to improve educators' classroom skills. 76.8% (36.8+40) of respondents think that performance measurement used in IQMS helps to determine staff development and in-service needs. 60% (36+24) agree that it helps to fulfil development objectives and plans for improvement. These results indicate how

performance measurement influences the performance of educators in their own opinion. This answers the question in 3.4 and the corresponding objective in 1.3.

- How effective is IQMS, in terms of the performance measurement for developmental purpose and pay progression?

Table 5.2.3.2 provides the opinion of educators regarding the contribution IQMS in terms of developmental purpose and pay progression. 81.6% (49.6+32) of the educators think that performance measurement is effective in determining pay progression. This result explains the objective in 1.3 and helps to answer the question above (in 3.4.)

- Has IQMS really contributed to the improvement of education in schools?

Table 5.2.5 provides the opinion of educators regarding the contribution IQMS has made for the improvement of education. 33.6% are of the opinion that IQMS enhances improvement in classroom performance whereas only 9.6% feel that it improves the outcomes/ national examination results.

5.3. Analysis of the data obtained from questionnaire B

This questionnaire was distributed to school management team (SMT). Out of 40 questionnaires distributed 36 were completed and returned. The sample size constituted of 32% of a total of 112 SMT members from the Mafikeng Area Project Office.

Section A of the questionnaire consisted of biographical data, Section B consisted of questions about the understanding of the purpose of IQMS in the opinion of school management team and Section C provided the area/s covered by IQMS in the opinion of the SMT.

These data are tabulated in the following sections. Table 5.3.1 indicates the category of SMT members and the corresponding percentages.

5.3.1 Category of SMT respondents

Table 5.3.1 provides the category of senior management team in both numbers and percentages. Table 5.3.1 indicates the percentage distribution of different SMT members. Heads of departments form 61% of the total SMT.

TABLE 5.3.1. CATEGORY OF SMT RESPONDENTS

Position	Number	Percentage
School Manager	6	16.7%
Deputy Manager	8	22.2%
Head of Department	22	61.1%
Total	36	100%

5.3.2. Respondents' number of years of experience

The data collected gives an idea of the number of years of experience each category of senior management has. Table 5.3.2 indicates the years of experience of the SMT members. Approximately 40% of the respondents fall in the range of 0 to 10 years and the other 60% have more than 10 years of experience.

TABLE 5.3.2 RESPONDENTS' NUMBER OF YEARS OF EXPERIENCE

YEARS OF EXPERIENCE	NUMBER OF SMT members	PERCENTAGE
0-5	4	11.1%
6-10	10	27.8%
11-15	18	50%
16 and above	4	11.1%
TOTAL	36	100%

5.3.2 Respondents' gender

TABLE 5.3.3 indicates the gender distribution of SMT members in schools. The distribution of male and female is approximately equal.

TABLE 5.3.3. RESPONDENTS' GENDER

GENDER	NUMBER	PERCENTAGE
Male	20	55.6%
Female	16	44.4%
TOTAL	36	100%

5.3.4. Understanding the purpose of performance measures in IQMS

Section B of Questionnaire B consists of responses which indicated how performance measures used in IQMS helps the educators/education in the opinion of the educators. The scale of values used was 1. Strongly disagree, 2. Disagree, 3. Agree and 4. Strongly Agree. The Table 5.3.4.1 provides the responses and Table 5.3.4.2. reflects the information in percentages.

Table 5.3.4.1 provides numbers representing the opinion of SMT members on the questions answered on the purpose of performance measures used in IQMS.

TABLE 5.3.4.1. PURPOSE OF PERFORMANCE MEASURES USED IN IQMS.

RESPONSE	STRONGLY DISAGREE	DISAGREE	AGREE	STRONGLY AGREE
To improve educators' classroom skills	0	0	32	4
To determine staff development and in-service needs	0	2	32	2
To decide on salary progression	0	0	34	2
To re-deploy educators according to schools' needs and teacher talents	2	10	16	8
To determine whether the policies of the Department of Education are being implemented	0	0	27	9
To motivate educators	0	0	34	2
To fulfil development objectives and plans for improvement envisaged	0	0	32	4

Table 5.3.4.2 provides the opinion of SMT members in percentages on how IQMS influences the performance of educators, how it can be useful in determining developmental purpose and pay progression and finally, how it contributed the improvement of education in schools.

**TABLE 5.3.4.2 PURPOSE OF PERFORMANCE MEASURES USED IN
IQMS – IN PERCENTAGES**

RESPONSE	STRONGLY DISAGREE	DISAGREE	AGREE	STRONGLY AGREE
To improve educators' classroom skills	0%	0%	88.9%	11.1%
To determine staff development and in-service needs	0%	5.6%	88.9%	5.6%
To decide on salary progression	0%	0%	94.4%	5.6%
To re-deploy educators according to schools' needs and teacher talents	5.6%	27.8%	44.4%	22.2%
To determine whether the policies of the Department of Education are being implemented	0%	0%	75%	25%
To motivate educators	0%	0%	94.4%	5.6%
To fulfil development objectives and plans for improvement envisaged	0%	0%	88.9%	11.1%

5.3.5. Area/s covered by IQMS

Response to section C of questionnaire B provided the area/s covered by IQMS in the opinion of the educators. The areas considered in this section were curriculum, classroom performance, outcomes/national exam results, wider school responsibilities, career aspirations and others. The responses to these and the corresponding percentages are provided in Table 5.3.5 below. The respondents selected more than one area. The analysis will be based on the percentage, even though the total percentage may exceed 100.

Table 5.3.5 provides data to arrive at a conclusion on whether IQMS has really contributed to the improvement of education, in the opinion of the senior management team of the schools.

Table 5.3.5 indicates the number and percentages of SMT members giving positive responses to the area/s covered by IQMS.

TABLE 5.3.5 AREAS COVERED BY IQMS

Area/s covered by IQMS	Number of responses	Percentage
Curriculum	12	30%
Classroom performance	28	70%
Outcomes/national exam results	15	37.5%
Wider school responsibilities	32	80%
Career aspirations	11	27.5%
Others	0	0%

Research problem:

- How performance measurement influenced the performance of educators?

All SMT members unanimously, 100% (88.9+11.1), were of the opinion that performance measurement influenced the performance of educators Table 5.3.4.2.

94.5% (88.9+5.6) think that IQMS is helpful to determine staff development and in-service needs.

- How effective is IQMS, in terms of the performance measurement for developmental purpose and pay progression?

All SMT members, 100% (94.4+5.6), think that IQMS is very effective for developmental purpose and pay progression (Table 5.3.4.2).

- Has IQMS really contributed to the improvement of education in schools?

Table 5.3.5 provides the opinion of SMT members regarding the contribution IQMS has made for the improvement of education. 70% are of the opinion that IQMS enhances improvement in classroom performance whereas only 37.5% feel that it improves the outcomes/ national examination results.

5.4. Summary

Chapter 5 dealt with the results of the research. It indicated how performance measurement influenced the performance of educators in the opinion of educators as well as the school management team (SMT). It further evaluated how effective is IQMS, in terms of the performance measurement for developmental purpose and pay progression. It also indicated whether IQMS has really contributed to the improvement of education in schools in the opinion of educators.

Chapter 6 focuses on the conclusion and recommendations based on the research results.

CHAPTER SIX

DISCUSSION, CONCLUSION AND RECOMMENDATIONS

6.1. Introduction

In chapter one, the objectives of the study were spelled out. Theoretical foundation and literature review were presented in chapter two. Research problem and research questions are presented in chapter three. Research design is explained in chapter 4 and research results are given in chapter five. In this chapter, the outcome of this study is fully discussed, relative to the research problems presented in this study, with cross-references to other relevant studies as covered in the theoretical foundation and literature review in chapter two. The chapter then closes with a general conclusion and concludes with recommendations for further research.

6.2 Discussion

According to Odhiambo (2005), formalised procedures for the measuring teachers' performance are viewed by educators as logical and essential for quality improvement. The same view is shared by educators in this study. Hattie and Clinton (in Odhiambo 2005) argue that "the major advantage of assessing teachers is the demonstration that the profession can identify value and reward the very best". Table 5.2.2.2 indicates that almost 82% of educators and all senior managers (100% as in Table 5.3.4.2) are of the opinion that performance measures used in IQMS helps to decide on salary progression.

The study revealed that 62% of educators (Table 5.2.2.2) and 100% of senior managers (Table 5.3.4.2) felt that performance measures used in IQMS assisted in improving educators' classroom skills. Table 5.2.2.2 also indicates that 60% of educators believe that performance measures used in IQMS are able to fulfil development objectives and plans for improvement. Odhiambo (2005) explains that international research reveals that appropriate appraisal schemes have the potential to improve the professionalisation of teaching. According to other researchers the most important strategy of maintaining and improving the knowledge and skills of teachers

is by career development process of teacher evaluation and professional development. Table 5.2.4 reveals that only 12% thinks that IQMS caters for fulfilling career aspirations. Senior managers also have a similar opinion. Only 27.5% (Table 5.3.5) feels that IQMS fulfils the career aspirations.

Implementing of effective teacher appraisal systems will need to be supported by a wide availability of training for appraisers and appraisees. Both educators and senior managers perceived a formal performance appraisal scheme as having many potential benefits. Educators were concerned about the purpose and implementation of appraisal. Majority of educators did not think that IQMS was able to motivate educators. Only 38% (Table 5.2.2.2) supported the view that IQMS helped to motivate educators. Table 5.3.4.2. indicated that the senior managers strongly felt that IQMS helps to motivate educators. This conflicting opinion indicates the weakness of the implementation of the process.

The opinion of educators with regard to the outcome measured in the form of national examination results does not provide an encouraging scenario, only 9.6% of educators and 37.5% of SMT members think in favour of IQMS in this respect. Students are the direct receivers of the delivery of the teaching services. Student experience and its improvement should be at the forefront of any monitoring of quality (Blackmore, 2005).

6.3 Conclusion

The long term impact of performance appraisal on educator performance depends on how far it is integrated with staff development. A weak link exists between performance appraisal, educator development and quality teaching.

The increasing needs to ensure teaching quality and better information about student achievement for public accountability and education improvement are becoming worldwide phenomena. The present IQMS is aimed to be more developmental, more facilitating and more acceptable. It is indeed desirable and important for a system of quality management (performance measure) to be associated with a support system aimed at improvement.

6.4 Recommendations

The performance measures should be focussing on the broader professional education of educators, the improvement of the quality of teaching and learning and the development of a quality assurance culture. It should aim for good teaching. It should address the requirements for subject matter and pedagogical mastery. Performance measure should emphasise the educators' responsibility for improving student achievement and the larger role of the educator within the school. These measures need to incorporate performance feedback information. Performance measures should be used to motivate staff to improve performance by establishing clear objectives for the future and advising educators on what is expected of them. Performance measures are more likely to succeed if it is integrated with teacher personal and professional development. Developing countries need to invest more in education and ensure that systems of education are efficiently managed. The limited resources and funds allocated should have maximum impact.

The possible purposes of appraisal are accountability, professional development or a combination of both. In many countries there has been much debate over these purposes and their relative merits. In some, early appraisal systems appear to have been oriented towards a professional development purpose but later moved towards the accountability or a combination of both (Gratton, 2004). Further, a sense of ownership and understanding of the purpose is noted as a factor in making an appraisal system more effective. Once the appraisal process is accepted by staff and is operational in the schools, the process needs to have not only initial preparation, planning, and documented process, but also committed and sustained follow-through at both the school and national department of education level.

Head teachers need to have a performance management arrangement. This should enable the department to reach a judgement about the overall performance of the head teacher during the year, including achievement against previously agreed objectives (Brown, 2005). Their professional development needs and activities need to be identified and finally to agree to new objectives. Among the objectives, at least one

should relate to school leadership and management and one to pupil progress. As with head teachers, it is recommended that teachers receive formal objectives, which should include at least one each for pupil progress, professional development and management.

One of the most challenging aspects of performance management in schools' initiative concerns the measurement of a head teachers' overall performance, which should have specific criteria to measure this performance. Future research may be carried out in order study whether schools whose objective setting process for teachers is based on a results/outcome philosophy tend to achieve better academic results than those schools which adopt an objective setting approach that is based more around teachers' professional development.

6.5 Conclusion

Chapter six dealt with discussion on the findings, conclusion and recommendations. It summarised the foundations of the study and then suggested recommendations based on the findings. Performance measure should emphasise the educators' responsibility for improving student achievement. The purpose of performance measures or integrated quality management should focus on the overall improvement in education, development of educators and accountability to the wider community.

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ANNEXURE QUESTIONNAIRE A

Please complete the questionnaire carefully to provide information on Integrated Quality Management System (IQMS) and express your honest opinion by marking the appropriate space with a 'X'.

NB. Do not write your name. The information will be treated in the strictest confidentiality.

SECTION A: BIOGRAPHICAL DATA

1. Your position in the school

Educator	
Head of Department	
Deputy Manager	
Manager	

2. Number of years of experience in the present position

0 – 5 years	
6 – 10 years	
11 – 15 years	
16 and above	

3. Gender

Male	
Female	

4. Highest Qualification

Matric	
Diploma	
Bachelors Degree	
Bachelors Degree + Educational Diploma	
Honours/B ED Degree	
Masters Degree	
Doctoral Degree	
Others (Specify)	

SECTION B

To what extent do you agree with the following statements with reference to IQMS. Use the following scale of values.

- 1. Strongly disagree**
- 2. Disagree**
- 3. Agree**
- 4. Strongly agree**

Performance measures used in Integrated Quality Management System helps,

- 1. to improve educators' classroom skills

--	--	--	--

- 2. to determine staff development and in-service needs

--	--	--	--

- 3. to decide on salary progression

--	--	--	--

- 4. to re-deploy educators according to schools' needs and teacher talents

--	--	--	--

- 5. to determine whether the policies of the Department of Education are being implemented

--	--	--	--

- 6. to motivate educators

--	--	--	--

- 7. to fulfill development objectives and plans for improvement envisaged

--	--	--	--

SECTION C

Identify your preference for appraisers from the following list of officials. Mark your choice with a 'X'

Principal	
Deputy Principal	
Head of Department	
A colleague/ peer	
An external educational evaluator	
An educator nominated by the administration	
Your students	

SECTION D

In your opinion, which are the areas covered by the appraisal process in the IQMS

Curriculum	
Classroom performance	
Outcomes/national exam results	
Wider school responsibilities	
Career aspirations	
Others	

QUESTIONNAIRE B

Please complete the questionnaire carefully to provide information on Integrated Quality Management System (IQMS) and express your honest opinion by marking the appropriate space with a 'X'.

NB. Do not write your name. The information will be treated in the strictest confidentiality.

SECTION A: BIOGRAPHICAL DATA

1. Your position in the school

Educator	
Head of Department	
Deputy Manager	
Manager	

2. Number of years of experience in the present position

0 – 5 years	
6 – 10 years	
11 – 15 years	
16 and above	

3. Gender

Male	
Female	

4. Highest Qualification

Matric	
Diploma	
Bachelors Degree	
Bachelors Degree + Educational Diploma	
Honours/B ED Degree	
Masters Degree	
Doctoral Degree	
Others (Specify)	

SECTION B

To what extent do you agree with the following statements with reference to IQMS. Use the following scale of values.

1. Strongly disagree
2. Disagree
3. Agree
4. Strongly agree

Performance measures used in Integrated Quality Management System helps,

1. to improve educators' classroom skills

--	--	--	--

2. to determine staff development and in-service needs

--	--	--	--

3. to decide on salary progression

--	--	--	--

4. to re-deploy educators according to schools' needs and teacher talents

--	--	--	--

5. to determine whether the policies of the Department of Education are being implemented

--	--	--	--

6. to motivate educators

--	--	--	--

SECTION C

In your opinion, which are the areas covered by the appraisal process in the IQMS

Curriculum	
Classroom performance	
Outcomes/national exam results	
Wider school responsibilities	
Career aspirations	
Others	

