

**EDUCATORS' PERCEPTIONS OF OUTCOMES-BASED
EDUCATION (OBE) ASSESSMENT**

By

MEKUBE NORAH MATSHIDISO

B. Ed

Dissertation submitted in fulfillment of the requirements for the degree

**MAGISTER EDUCATIONIS
In Learning and Teaching**

**In the Faculty of Education Sciences
of the
North-West University (Potchefstroom Campus)**

Supervisor: Prof L.W. Meyer

February 2007

ACKNOWLEDGEMENT

I wish to extend my sincere gratitude to the following for contributing towards the completion of my research study:

- God my Redeemer, for His showers of blessings so that I managed to complete my studies.
- My supervisor Professor Lucas Meyer, for his wonderful guidance and great support.
- I am also grateful for the encouragement and support my lovely family gave me. My special thanks go to my special and wonderful husband, Thakadu, my three sons Oarabile, Boipelo and Rebaabetswe, and their sisters Kopo, Reneilwe, Kgomotso, Tshinangwe and Mmamane Flora. My late parents Nkata and Mosala, my late mother-in law Serwalo and my father in law Nthaudi,
- The Institute Support Co-ordinators of Bojanala Region, who helped me in distributing and collecting questionnaires from schools, as well as principals and educators who participated in this study by completing the research questionnaires.
- The librarian, Ms Yvonne Bucwa and other library staff for electronic retrieval of information and other assistance given,
- Statistician Dr Suria Ellis for analyzing the research data,
- Ms Cecilia van der Walt for her patience in editing my research work, and finally my grateful acknowledgement is made to all those who made it possible for me to complete my research studies.

DECLARATION BY THE LANGUAGE EDITOR

Hereby I, Ms Cecilia van der Walt, certify that I did the editing of the dissertation of ms Mekube Matshidiso, titled 'Educators' perceptions of Outcome Based Education (OBE) Assessment'

MS CECILIA VAN DER WALT

BA, THED

Plus Editing and Translation at Hons. level,

Plus Accredited with SATI for Afrikaans

Registration number with SATI: 1000228

Telephone numbers: 018-290 7367 (H)

 083-406 1419 (S)

E-mail address: ceciliavdw@lantic.net

SUMMARY

Since the implementation of Outcomes Based Education (OBE) in South Africa, educators were confronted with new challenges regarding teaching, learning and assessment. A substantial number of educators seemed to experience these challenges as stressful, because they were not sufficiently prepared for the didactic paradigm shift and they were also unfamiliar with the OBE-terminology and methodology. This situation resulted in a widespread degree of negativity and resistance amongst teachers towards the implementation of OBE in general, and specifically concerning issues related to outcomes based assessment (OBA).

The primary aim of the research was to determine how educators perceive OBA and what problems they experience with the implementation thereof.

In order to achieve the above-mentioned aim, 220 educators from the Bojanala West Region of the North-West Province participated in a survey. This survey was conducted by means of a questionnaire which contained structured and unstructured items.

Based on the results emanating from this survey, the following conclusions were drawn:

- The participants endorsed the theoretical foundations on which OBA is based and they were of opinion that OBA can provide the necessary focus for an improvement in teaching and learning, but they displayed negative perceptions concerning the practical implementation thereof.
- The participants' negative perceptions regarding the implementation of OBA were caused by:
 - a lack of knowledge and skills due to inadequate training;
 - a lack of departmental support and guidance;

- the administrative over-load brought on by OBA;
- over-crowded classrooms and infrastructural deficiencies; and
- a lack of parental support and involvement.

In the light of the findings of the research, recommendations were made to enhance the practical implementation of OBA in schools.

Key words: Outcomes Based Education (OBE); Outcomes Based Assessment (OBA); educators' perceptions of OBA; problems/challenges with OBA.

OPSOMMING

Sedert die implementering van Uitkoms-gebaseerde Onderwys (UGO) in Suid-Afrika is onderwysers gekonfronteer deur nuwe uitdagings met betrekking tot onderrig, leer en assessering. 'n Beduidende aantal onderwysers het hierdie uitdagings as stresvol ervaar omdat hulle nie behoorlik voorberei was vir die didaktiese paradigma-skuif nie en hulle ook nie vertrouwd was met die UGO-terminologie en –metodologie nie. Hierdie situasie het 'n wydverspreide graad van negatiewe persepsies en weerstand by onderwysers teenoor die implementering van UGO in die algemeen ontketen, en spesifiek rakende kwessies wat verband hou met uitkoms-gebaseerde assessering (UGA)

Die primêre doel van die ondersoek was om die persepsies van onderwysers van UGA te bepaal en aan te dui watter tipe probleme hulle met die implementering daarvan ervaar.

Ten einde bogenoemde doel te bereik, het 220 onderwysers van die Bojanala-wesstreek van die Noordwes-Provinsie aan 'n opname deelgeneem. Hierdie opname is deur middel van 'n vraelys bestaande uit gestruktureerde en ongestruktureerde items uitgevoer.

Op grond van die resultate wat uit die opname voortspruit, is die volgende gevolgtrekkings gemaak:

- Die deelnemers het die teoretiese boustene waarop UGA gebaseer is, ondersteun, en hulle was van mening dat UGA die nodige fokus kan verleen wat aanleiding kan gee tot 'n verbetering in onderrig en leer. Hulle het egter negatiewe persepsies getoon met betrekking tot die praktiese implementering van UGA.
- Die deelnemers se negatiewe persepsies rakende die implementering van UGA is veroorsaak deur:

- 'n gebrek aan kennis en vaardighede as gevolg van ontoereikende opleiding;
- 'n gebrek aan departementele ondersteuning en leiding;
- 'n administratiewe oorlading wat deur UGA meegebring word;
- oorvol klaskamers en infrastrukturele tekorte; en
- 'n gebrek aan ouerlike ondersteuning en betrokkenheid.

Op grond van die bevindinge voortspruitend uit die navorsing, is aanbevelings aan die hand gedoen ten einde die praktiese implementering van UGA in skole te bevorder.

Sleutelwoorde: Uitkoms-gebaseerde Onderwys (UGO); Uitkoms-gebaseerde Assessering (UGA); onderwysers se persepsies van UGA; probleme/uitdagings met betrekking tot UGA.

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CHAPTER 1

INTRODUCTION, PROBLEM STATEMENT, RESEARCH AIMS AND METHOD OF RESEARCH

1.1 INTRODUCTION

South African educators are faced with a process of change in education. The introduction and implementation of the new approach to education: Outcomes-Based Education (OBE) is a real challenge for educators (Combrinck, 2003:51). The new approach to education and training is characterised by a holistic and integrated perspective to learning, enabling learners to apply knowledge acquired in one learning area in other learning areas and to real-life situations. Educators have to acclimatise themselves to the new approach in the educational transformation system happening in South African schools (White, 2000:1).

Killen (2000:48) recommends that the whole school system educators, learners, parents, administrators and the community at large need to know what Outcomes-Based Education (OBE) is about, its strengths and why they should support it. Therefore there is a need to market the OBE curriculum. The challenge facing curriculum reformers is to change the attitudes and beliefs of educators and learners from being educator-centred to being learner-centred.

Van den Berg and De Boer (2000:107) point out that the OBE approach emphasises the paradigm shift from the traditional curriculum, with its educator-centred, transmission of knowledge type of focus, to an active learner-centred focus. The traditional way of teaching and assessing, where the educator was the soul imparter of knowledge and evaluator of learners' scholastic performance, has changed to a situation where the teacher facilitates learning and the learner is actively participating in the learning and assessment process.

Educators still find it challenging to practice learner-centredness as they are used to educator-centredness (Van den Berg and De Boer, 2000:107).

Simonds (1994:12) states that not only the South African education system has been affected by the OBE curriculum; other countries such as Australia, New Zealand and the USA have also been affected. Some education systems have been ridden by conflict over the issue of OBE. Parents across the United States of America were also sceptical about simplified slogans such as “learning to learn” and “critical thinking skills”. Instead they advocated for a curriculum based on solid core knowledge (Simonds, 1994:12). Schlafly (1993:1) notes that OBE was sweeping the countries such as Pennsylvania, Washington and Oklahoma in the name of school restructuring, instead of clearly defining it as OBE. Since some members of the American public seemed ready to accept drastic surgery on failed public schools, state departments of education were seizing this opportunity to force acceptance of OBE as the cure (Schlafly, 1993:1).

Like many other governments across the world and in line with the shift towards OBE, the South African government has recently begun to introduce new measures of accountability – a trend which has direct implications for educators. Through various educational policies the government has begun to provide systemic means to assess the degree to which the instructional environment of the average South African classroom is conducive to the task of achieving the nationally mandated learning outcomes. Assessment should take place in order to determine whether the learning outcomes are achieved (Shalem, 2003:29).

Assessment is one of the most burning issues related to OBE. Scheffler and Rodseth (1999:20) stress the fact that the assessment of learners in terms of Curriculum 2005 represents one of the major shifts from the traditional to the new OBE curriculum. Educators are not always aware that assessment is just as important as teaching and learning. Outcomes (teaching and learning) and assessment are in fact very closely intertwined (Vermeulen, 1997:84).

An important implication of the interwoven relationship between teaching, learning and assessment is that OBE assessment should be criterion-referenced and skills-based, rather than norm-referenced and content-based. Furthermore, learners should be continuously assessed and educators should use multiple assessment methods. Learners must be assessed as to whether or not; they have achieved a particular learning outcome (Van der Horst and McDonald 1997:34).

According to Lubisi, Parker and Wedekind, (1999:23) and Pahad (1997:1) formal assessments such as examinations and tests were traditionally used as mechanisms for disciplining learners. Tests and examinations dominated assessment activities throughout the year, and other assessment strategies were not considered.

Schlaflly (1993:2) argues that OBE tossed the traditional teaching and learning objectives out of the window and replaced them with vague subjective learning outcomes that cannot be assessed objectively. OBE makes it virtually impossible to conduct any kind of evaluation that allows reliable comparisons with the achievements of learners in other schools.

McNeir (1993:3) contends that major controversy exists on the notion of content versus process assessment. OBE assessment de-emphasises the importance of specific subject content in favour of the realisation of broader learning outcomes. This leaves educators with the difficult question as to what learning content should remain in the curriculum. Parents begin to lose their trust in educators and voice their concerns about learners who have not achieved the basic scholastic skills of reading, spelling and calculating.

It seems that educators find it difficult to assess knowledge, skills, attitudes and values, as they mostly assess knowledge only. The OBE curriculum requires learners to be able to demonstrate not only their knowledge, but also attitudes,

values and skills. Furthermore, Musker (1997:34) states that the aim of OBE is to allow learners to demonstrate their knowledge and skills in different ways - sometimes in ways that are unique to a particular learner. The learner therefore has to be assessed holistically and not only in certain spheres of scholastic competency.

Lewis (2004:7) believes that planned assessment should be balanced and should also assess the learner's knowledge, skills and attitudes to develop the learner as a whole. There should also always be a valid reason for assessing learners. Learners should know why and what is expected of them when they are assessed. It is not only the educator who should be involved in the learner's assessment the learners should also actively participate in the learning and assessment process. The afore-mentioned demands an entirely new didactic approach towards assessment and also different assessment methods than those which educators used in the past.

It seems that educators do not have enough time or the necessary skills to plan for assessment activities as prescribed by OBE. Dreyer and Van der Walt (1999:109) explain that assessment in an OBE context requires a significant portion of a teacher's professional time and energy. Educators therefore need more time to plan and implement their assessment activities and strategies to successfully assess knowledge, skills and attitudes in their classrooms.

Changes in assessment methods and subsequent shifts in teaching practice can be threatening to educators, learners and parents, as many of them have become accustomed to traditional forms of teaching and assessment (AMESA, 1999:18). Outcomes-based assessment does not mean that educators will have to abandon all the proven and familiar traditional assessment methods. Tests and examinations can also play an important part in OBE assessment, if done in a planned way and for a particular purpose. The usual pen and paper types of assessments such as tests and homework are still necessary, and grading still

remains important, but educators also need to implement a variety of assessment methods (Drinkwater and Nieuwoudt, 1998:34).

Educators should thus be aware of and be trained in different strategies and methods of OBE assessment and be familiar with their different purposes. The educator should use a variety of methods, appropriate tools and techniques that are commensurated with the learner's needs (DoE, 1998:22).

From the preceding paragraphs it is clear that educators should be properly informed and trained in order to make a success of assessment in an OBE context.

1.2 RESEARCH PROBLEM

Conley (1993:11) accentuates that the most dangerous pitfall for schools, when adopting the philosophy of OBE, is to not implement any of the necessary didactic changes. To avoid the daunting task of rethinking and modifying their didactic approach, some schools simply stick to the existing curriculum and assessment practices. Research done by Soudien and Baxen (1997:445) indicated that the perception held in South Africa is that the OBE curriculum would serve to help those who were historically educationally disadvantaged. It was not meant for Whites educators and learners, but was introduced for Black educators and learners to be on par with their White counterparts. Some people believe that OBE is a placatory device for disadvantaged educators and learners (Soudien and Baxen, 1997:445).

Combrinck (2003:52) assumes that teachers' lack of knowledge and experience concerning the implementation of the outcomes based curriculum became a major obstacle since the introduction of OBE in South Africa. After attending OBE in-service training sessions, educators experienced several implementation problems. Apart from teachers' lack of knowledge and experience regarding

OBE, their negative attitudes and beliefs concerning OBE and outcomes based assessment (OBA) also are major obstacles in the way of successful implementation of the curriculum (Combrinck, 2003:52 ; Koekemoer and Olivier, 2002:33).

These negative attitudes and beliefs can to a large extent be ascribed to teachers' unfamiliarity with and ignorance regarding OBE. The impact of negative attitudes and beliefs concerning OBE should be well considered, as this can negatively affect the successful implementation of OBE in South Africa (Koekemoer and Olivier, 2002:33).

Soudien and Baxen (1997:445) contend that OBE also failed to address issues experienced by white educators in the previous educational dispensation. The adoption and implementation of the OBE approach allowed some white educators to claim that OBE was what they had been doing all along and therefore it was not necessary for them to modify their didactic approaches and practices.

Baron and Boschee (1996:3) argues that OBE, and specifically OBE assessment, is too complex to be well understood or implemented by all educators.

Educators are probably not well trained and experience a lack of confidence with regard to their OBE assessment competencies. Educators complain that there was a lack of well-trained departmental officials to provide the necessary training for the successful implementation of OBE assessment. Many of the educators did not have access to training material related to OBE assessment and experienced this as an added constraint. One particular problem educators experience is to transform broader learning outcomes into more precise, measurable outcomes (Baron and Boschee, 1996:3).

Combrinck (2003:54) points out that educators in other countries such as Australia, New Zealand and America also experience similar problems with regard to OBE training. The majority of educators in these countries believe that they neither receive sufficient or adequate training in OBE nor inadequate departmental support.

Research conducted by Schulze (2003:7) shows that learners in South Africa reported a willingness to move towards more meaningful teaching and learning approaches. Yet, at the same time they seemed to prefer traditional teaching practices for various reasons. If learners do not experience effective learning, educators will be faced with a major challenge. For educators to be able to change their traditional teaching approaches, they require relevant training. Training should focus on curriculum design, the use of multi-media print and the practical implementation of contemporary teaching and learning theories (Schulze, 2003:7).

Lewis (2004:2) claims that most of the South African educators were amateurs at carrying out significant didactic changes. They did not know how to begin, and more importantly, they did not know exactly where they were going, or how to assess the progress of learners in order to determine whether the learners have achieved the desired learning outcomes. This state of affairs is not unique to the South African situation.

In Pennsylvania in the USA, the state legislature only provided a list of learning outcomes, or academic goals learners should achieve. The educators found it very difficult to determine how to structure the teaching and learning environment so that learners would achieve these outcomes (Parkin, 1994:22).

Killen (2000:93) points out that the most frustrating experience for educators who are trying to implement OBA is a lack of information about what they are required to do and how they should go about doing it.

It was indicated by Jansen (1998:8) that OBE assessment places a very heavy administrative burden on educators, and that the numbers of assessment tasks have increased vastly, which is extremely time-consuming. Macintosh (1998:60) mentions that the main complaint educators always have concerning OBE assessment is that the assessment process does not fit the time available. There are too many outcomes and assessment criteria to assess properly. Most educators find it difficult to give feedback on learners' progress. OBE assessment requires educators to keep good records of the progress made by learners, which is also time-consuming.

Combrinck (2003:54) says that educators in Australia, New Zealand and America also felt that OBE-assessment definitely increased their workload. Linked to this, Jansen (1998:9) mentions that the larger number of learners in the class coupled with fewer educators (due to rationalisation) has become a real issue in the successful implementation of OBE.

When OBE was introduced in South African schools, the DoE (1997:2) required educators to follow some new approaches to planning, teaching and assessment. *This was stressful for many educators who felt that they were ill prepared for this paradigm shift.* Educators' responses to the curriculum changes varied; a few educators embraced the changes enthusiastically, many reluctantly accepted the changes, and most resisted it (DoE 1997:2).

Singh (1997:6) mentions that some of the problems raised by educators concerning OBE were: the effectiveness of the OBE assessment approach in large classes, the influence of a lack of facilities and resources on OBE assessment, the problematic implementation of the new OBE assessment methods and the influence of multicultural classes on all aspects of OBE assessment.

Chisholm (2000:90) agrees that a severe lack of material resources and large class sizes appeared to be one of the hugest problems related to OBE assessment. Many of the schools in some of the provinces lack basic resources such as electricity, running water, photocopiers, computers or even manual typewriters. Without these, it becomes difficult for educators to develop and reproduce materials, such as worksheets, necessary for the development of an effective OBE learning environment.

In the light of the above-mentioned problems and issues related to the implementation of OBE and OBE assessment, the following research questions were formulated for purposes of this study:

- what does the term “*assessment*” in the South African Outcomes-Based Education context imply?
- what are the pre-requisites of effective Outcomes-Based Assessment in terms of assessment strategies and methods?
- to what extent are educators trained and competent to conduct Outcomes-Based Assessments (OBA)? and
- how do educators perceive OBA and what problems do they experience with the implementation thereof?

1.3 RESEARCH AIMS

In order to shed light on the above-mentioned research questions, the study will focus on the following:

- To explore the meaning and implications of the term “assessment” in an Outcomes-Based South African context;
- To determine the pre-requisites of effective Outcomes-Based Assessment in terms of assessment strategies and methods;

- To determine to what extent educators have been trained and are competent to conduct Outcomes-Based Assessment (OBA); and
- To empirically determine how educators perceive OBA and what problems they experience with the implementation thereof.

1.4 METHOD OF RESEARCH

In order to address the research questions and to achieve the aims of the research, the following research methods will be implemented:

1.4.1 Literature review

A literature study will be undertaken in order to review the relevant and current literature dealing with OBE assessment. Concepts related to OBE assessment will be clarified, theoretical viewpoints and issues will be raised and findings of research related to the field of OBE assessment will be highlighted and analysed.

1.4.2 Empirical investigation

In order to address the research questions and to achieve the aims of the research, survey research will be undertaken.

1.4.2.1 Population and sampling

The study population consisted of all the Intermediate and/or Secondary schools in the Bojanala West Region (Rustenburg) of the North West Province.

From each of the schools in the study population, one grade 9 educator was randomly selected as a participant. OBE has been implemented in grade 9

during 2002 and therefore these educators should have gained first-hand experience with the OBE curriculum and OBE assessment.

1.4.2.2 Instrumentation

A structured questionnaire was developed and distributed to the participants at the schools.

1.4.2.3 Ethical aspects

Permission was obtained from the four Area Project Offices (APOs) of the Bojanala West Region to conduct the research in different schools. A list of all schools was also obtained from the District EMIS section. Thereafter principals of schools were approached to allow educators at their schools to complete the questionnaires.

Participants participated on a voluntary basis. No school or individual was identified in the process and the results of the research will be shared on an anonymous basis with the North-West Department of Education and the schools who participated in the research.

1.4.2.4 Data analysis

Computer aided statistical analysis was done by the Statistical Consultation Service of the North-West University (Potchefstroom Campus). The Statistical Consultation Service recommended appropriate statistical programmes, methods and techniques.

1.5 CHAPTER DIVISION

For purposes of this study the following chapters were included in the dissertation:

Chapter 1: Introduction, problem statement, research aims and method of research

Chapter 2: Outcomes-Based Education (OBE) within a South African context

Chapter 3: Outcomes-Based Education (OBE) Assessment.

Chapter 4: Research method.

Chapter 5: Results, conclusions and recommendations.

CHAPTER 2

OUTCOMES-BASED EDUCATION (OBE) WITHIN A SOUTH AFRICAN CONTEXT

2.1. INTRODUCTION

South Africa has been faced with many educational challenges and changes since 1994. One of the major changes was the introduction of a new curriculum for a democratic South Africa by means of the National Curriculum Framework (Russell and Gardner, 2004: iv).

Botha (2002:361) states that South Africa is one of the most complex and heterogeneous countries in the world. During the beginning of the past decade, education in South Africa was in a state of turmoil and it experienced a major crisis. This crisis was characterised by, among others, unequal access to schools, unequal educational opportunities, irrelevant curricula, inadequate finances, and inadequate facilities, shortages of educational material, the enrolment explosion and inadequately qualified teachers (Van der Horst and McDonald, 1997:5).

Botha (2002:361) indicated that adding to the above-mentioned crisis, were problems such as major inequalities in South African society, very high school drop-out and failure rates, an examination orientation with a major emphasis on rote learning, and unimaginative teaching methods. Taking all these factors into consideration, change was sought in South African education.

This chapter deals with OBE with specific reference to the South African context. The differences between the traditional and outcomes-based didactic approaches as well as those between Curriculum 2005 (C2005) and the Revised National Curriculum Statements and National Curriculum Statements will be highlighted.

2.2 WHAT IS OUTCOMES-BASED EDUCATION?

Killen (2000:85) describes OBE as an approach to planning, delivering and evaluating instruction that requires educators and learners to focus their attention and efforts on the desired results of education that are expressed in terms of the attainment of individual learning outcomes. Scheffler and Rodseth (1999:5) state that it is generally agreed that when learning takes place, learners acquire skills, attitudes or knowledge of concepts or processes that they did not previously have. These end products of the learning process are called outcomes. When people decide, before learning takes place, what these end products must be, and then write them down as statements to develop learning programmes, we say that the system is outcomes-based (Scheffler and Rodseth, 1999:5).

Van der Horst and McDonald (1997:7) add to the previous statement by saying that OBE is an approach which requires educators and learners to focus their attention on the desired end results of each process. These desired end results are called the outcomes of learning, and learners need to demonstrate to what extent they have reached the outcomes. The focus is on both the teaching and learning processes that will guide the learners to achieve the anticipated outcomes. Stuter (1996:1) describes OBE as a paradigm shift from a content driven to a process driven approach where learners are called upon to demonstrate what they know and can do measured against standards established at national and provincial levels. Instead of core knowledge being the focal point of education, problems, issues and challenges based on specific contexts and future trends, become the focal point.

White (2000:2) also states that OBE involves moving away from traditional content-driven teaching towards outcomes-based learning. The old traditional emphasis on rote learning must be replaced with learner-centred, outcomes-based and activity-based education. Lubisi, Parker and Wedekind (1997:3) also define OBE as education which is not planned around prescribed subject matter

that learners ought to learn. Instead, it is geared towards the learner being able to demonstrate clear signs of having learnt valued skills, knowledge or attitudes.

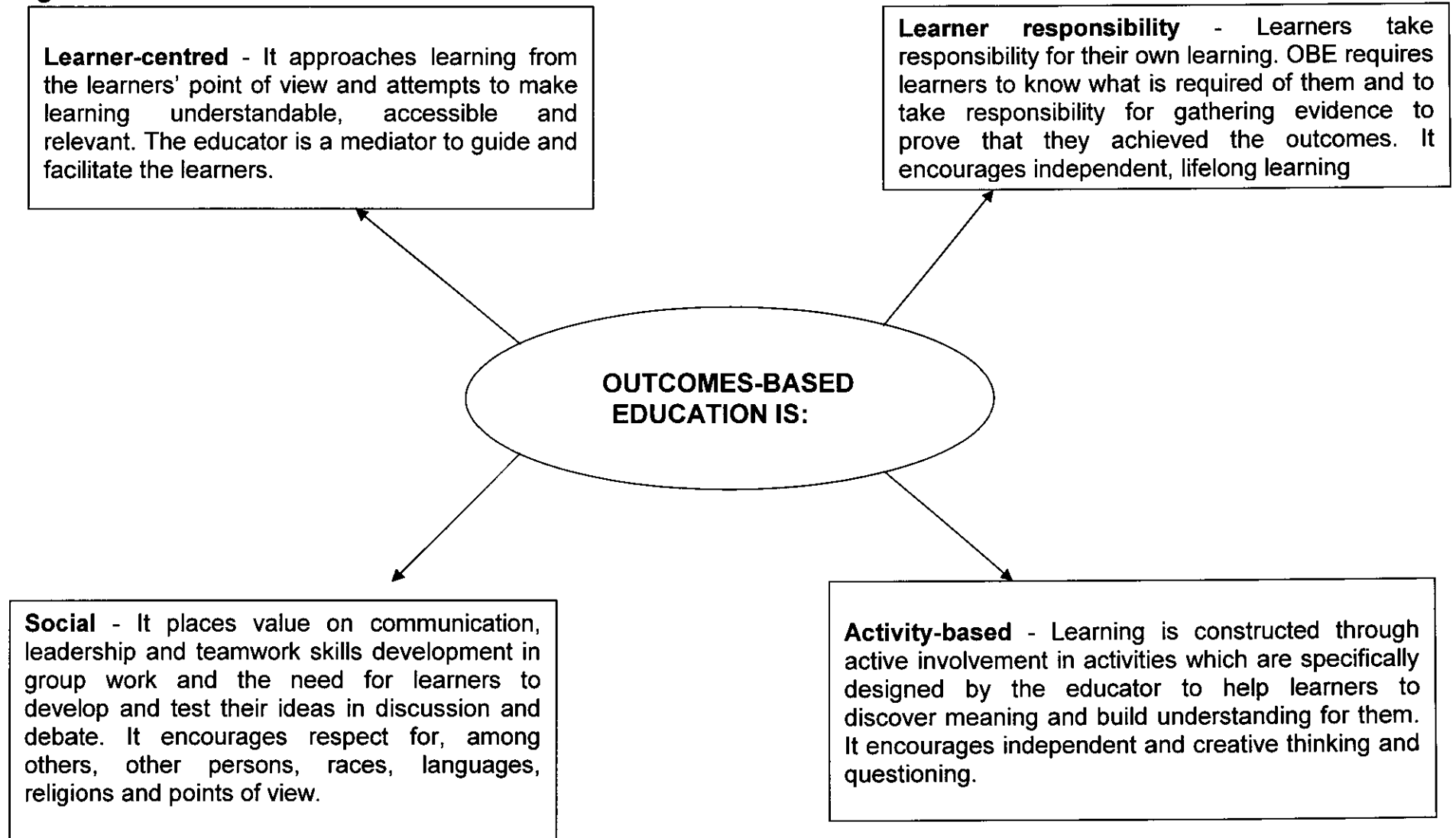
Lubbe, Athiemoolam and Mitchell (2000:91) indicate that by means of OBE, learners will be facilitated in developing the ability to think, reason, criticize, deliberate, socialise and apply their knowledge and skills within a specific context, thus preparing learners for the real world. OBE is a flexible, empowerment orientated approach to learning. It aims at equipping learners with the knowledge, competencies and orientations needed for success after they have left school or completed their training (Lubbe *et al.*, 2000:91).

Sieborger and Macintosh (1998:35) describe OBE as an approach to teaching and learning which stresses the need to be clear about what learners are expected to achieve. The educator's task is to teach in accordance with the stated curriculum outcomes. The task of the learner is to achieve the expected outcomes.

Mosala, Paizee and Pieres (1997:194) indicate that the educational approach known as OBE aims not only at increasing the general knowledge of learners, but also at developing their skills, critical thinking, creativity, attitudes and understanding. Learners and educators focus their attention on the results (outcomes) expected at the end of each learning process. Teaching will become learner-centred, with an emphasis on group work and the development of learners' ability to think critically, to conduct research and analyze things for themselves (Mosala *et al.*, 1997:194).

Bixler (2005:11) contends that OBE makes a great deal of sense. It defines a set of competencies that reflect the needs of society, and then it ensures that all learners meet or exceed them before they graduate. This simple aim of OBE is to revolutionize the way learners are taught and to prepare them for the future. In accordance with the above-mentioned authors, Shuter and Shooter (2005:4) describe OBE as an activity-based, social and learner-centred approach. Outcomes are prescribed nationally for all schools and learning areas. However, individual educators can determine the way by which learners will

work towards the outcomes. In accordance with Shuter and Shooter (2005:4), the basic characteristics of OBE are hence outlined in Figure 2.1.

Figure 2.1: Basic characteristics of OBE

OBE beliefs and principles are organized from a focus on learner exit outcomes and designed downwards to learning unit levels. It focuses instructional strategies on clearly defined learning outcomes where high standards and expectations are set for all learners. It also provides expanded opportunities for enrichment and remediation (Houston, 2002:5). The basic principles of OBE are discussed in the subsequent paragraph.

2.3 BASIC PRINCIPLES OF OUTCOMES-BASED EDUCATION

2.3.1 Clarity of focus

Clarity of focus means that everything the educators do should be guided by outcomes that they wish learners to achieve. Educators must ensure that learners are clear about the criteria against which they are to be assessed and what they are expected to demonstrate. The outcomes must be clear to both the educator and the learners before any decisions are made concerning the way in which instruction will be organised, what teaching strategies will be used, what content will be covered, how learners will be assessed and what resources are available (Killen, 2000:122 and DoE, 1997:18).

2.3.2 Design down/back

DoE (1997:18) and Killen (2000:123) believe that design down/back means that the outcomes to be addressed through teaching and learning must clearly be stated before developing the teaching and learning activities. When planning for assessment, educators must first start by identifying the stated outcomes and then choosing the appropriate assessment methods, tools, techniques and activities for assessing the outcomes

2.3.3 High expectations

High expectations imply that educators must assist learners in reaching their full potential. Educators should have high expectations for all learners, they should not be satisfied if some learners learn a lot and some learn very little. When learners experience success, it reinforces their learning, builds their confidence and encourages them to accept further learning challenges. Helping learners to achieve high standards is linked very closely to the idea that successful teaching promotes successful learning (Killen, 2000: 126; and DoE, 1997:19).

2.3.4 Expanded opportunities

DoE (1997:18) and Killen (2000:127) claim that not all learners can learn the same thing in the same way and at the same time. Educators must find different ways of exposing learners to those learning opportunities that will help them to demonstrate their full potential in terms of knowledge, skills, values and attitudes. Educators should occasionally ask learners to choose the assessment techniques they prefer to be assessed with.

The DoE (1997:11) believes that if the above principles could be used as the core for teaching and learning, legitimately the system could be called Outcomes-Based Education. These four basic principles are linked to one another, and OBE can only be successfully implemented by deliberately, systematically, creatively and simultaneously applying the four key principles. Another important aspect of implementing OBE is that educators really need to understand what assessment is all about (Spady and Marshall, 1991:67).

2.4 The advantages of OBE

Meyer (1999:7) describes the advantages of OBE as follows:

- ◆ learners know exactly what is expected of them as unit standards make expectations very clear;
- ◆ a well-defined assessment criterion gives clarity to both the learner and the assessor on how assessment will take place;
- ◆ there is a greater buy-in and support for OBE from all role-players due to the extensive level of consultation and stakeholder involvement;
- ◆ OBE promotes the acquisition of specific skills and competencies in a country where there are many shortages of skills;
- ◆ OBE fosters a better integration of education being offered at schools, the workplace and institutions of higher education;
- ◆ OBE helps learners to accept responsibility for their own learning, as they are now at the centre of the learning process; and
- ◆ OBE recognizes prior learning so that the duplication and repetition of previous learning situations can be prevented.

A number of the other advantages of OBE are as follows (Hong, 1996:1):

- like in a marathon, OBE enables learners to accomplish their own personal educational goals with proper facilitation, support and encouragement;
- the learning outcomes guide learners to learn and master appropriate skills;

- OBE departs from a comprehensive educational approach emphasizing the importance of early education, improvement of the curriculum and intensive remedial interventions. Learners with barriers to learning will benefit from OBE, because OBE paves the way for the most appropriate remedial and special education interventions; and
- the assessment and grading system of OBE rather relies on continuous informal assessments than on formal paper and pencil tests or examinations.

Shuter and Shooter (2005:4) assume that the introduction of OBE moves the focus from what the educator should teach, to what the learner should know and be able to do as a result of learning. Shuter and Shooter (2005:5) distinguished the following features of the OBE classroom:

- the classroom is set up so that learning can take place individually, and in groups;
 - furniture is movable to accommodate a variety of approaches and learning methods;
 - different learners can be involved in different activities at different times;
 - resources are available so that learners can use a variety of sources for their learning. These resources are designed to challenge learners to think critically about the content, promoting active rather than passive learning;
 - learners who work at different speeds are accommodated in the classroom; and
 - learning also takes place outside the classroom.
-

2.5 ESSENTIAL CHARACTERISTICS OF OBE

An OBE approach to education is based on what learners should understand, be able to do and value as a result of coming to school. Houston (2002:6) identified the following essential characteristics of OBE:

- instructions are defined in terms of outcomes to be achieved;
- instruction is individualised/personalised;
- individual learning experiences are guided by regular feedback;
- the learning programme is systematic;
- emphasis is on exit and not entrance requirements;
- instruction is modularised; and
- the learner is held accountable for completing the learning programmes.

Despite the many identified advantages and benefits of an OBE approach, some drawbacks exist and criticisms have also been directed against OBE.

2.6 CRITICISMS DIRECTED AGAINST OBE IN DIFFERENT COUNTRIES OF THE WORLD

Simonds (1994:19) states that people in different countries of the world complain about OBE. Confusing statements concerning the quality of academic content have caused state after state in the USA to abandon OBE. Parents are also concerned about other features of OBE, including its overwhelming emphasis on personal qualities (Simonds, 1994:19).

Some learners are not ready to adapt to OBE, because the gap between a teacher- and learner-centred approach to teaching and learning is not bridged overnight. OBE requires teachers to rewrite most of the learning material and this call for a major investment in time and resources (Meyer, 2004:67). OBE also demands academic quality assurance systems that differ from those of the previous educational approach. The scope and greater variety and application of OBE assessment methods are extremely time-consuming to implement

(Meyer, 2004:67). Teachers must also be retrained to acquire the necessary knowledge, values, and competencies to successfully implement OBE.

It is claimed by Hong (1996:2) that public criticisms against OBE are that, academically, the approach is not strong enough and that OBE would weaken the academic rigour of high-achieving learners and cause a deterioration of academic standards.

Jacobs (2001:99) contends that another point of criticism is that OBE-assessment practices are unclear. OBE emphasizes higher-order thinking skills, communication skills, negotiation skills and decision-making skills which are particularly difficult to assess when using a rubric system, because these skills are a composite of many other skills such as cognition, meta-cognition and socialization skills. Jacobs (2001:99) stated that implementation of OBE is unclear, because it lacks the practical methods to implement and apply in the current school setting.

Opponents of OBE claim that it is an experimental model and needs to be studied carefully. Although there is a great deal of literature on educational strategies which are considered to be compatible with OBE, little valid, empirical research exists on OBE itself (Bixler, 2004:12). Advocates of OBE do indeed have a difficult time providing concrete examples of successful implementations of OBE. Critics of OBE say that in the light of the limited research being done on the efficacy of OBE, educationists should start by implementing OBE on small scale in, carefully monitored settings. If it does prove to be successful, then and only then, should OBE be implemented on a larger scale (Bixler, 2004:12).

Opponents of OBE also state that the general public want a competitive model of education, where learners compete for grades, and "smart" kids are rewarded for their academic achievements (Russell and Gardner, 2004). These opponents claim that the group-work approach, which is often used in OBE, will lead to a situation where the "smart" kids will do all the work without receiving

the necessary recognition for their efforts. This lack of recognition will then become a de-motivating factor for dedicated learners.

Bixler (2004:12) indicates that opponents of OBE raise the following questions pertaining to how the school can align traditional didactic approaches with the OBE approach: (i) Does the formulation of learning outcomes imply that in addition to existing teaching and learning material, new "OBE material" must be developed? (ii) Should schools favour the learning outcomes and focus less on traditional, academic areas of study? (iii) Who will decide what is important and of minor importance?

Killen (2000:74) argues that there is general confusion about just what OBE is and whether or not there should be a South African version of OBE which differs from OBE versions in other countries of the world. The confusion can be reduced if the different aspects of OBE are separated, being: the foundational philosophy, systemic structures and classroom practice (Killen, 2000:74). The foundational philosophy is a set of beliefs and principles OBE is based on, and these do not change. The systemic structures are policies, curriculum frameworks and bureaucratic structures. The classroom practice of OBE relates to what happens on a daily basis when educators implement the philosophy within the systemic structure (Killen, 2000:74).

2.7 OBE WITHIN THE SOUTH AFRICAN EDUCATIONAL CONTEXT

2.7.1 The adoption of Curriculum 2005

Since the dawn of the new democracy in South Africa (1994), the ANC government has been striving to root out apartheid education and to coin a new educational vision of educated and empowered citizens for the future South Africa. OBE, and more specifically, C2005, was chosen as the vehicle to improve the quality of education in South Africa (DoE 1997:10).

Van der Horst and McDonald (1997:10) claim that the South African OBE model C2005 – was chosen as the most appropriate vehicle to change the face of South African education and training because it:

- integrates education and training;
- promotes lifelong learning for all South Africans;
- is based on outcomes rather than content;
- equips all learners with the necessary knowledge, competencies and orientations to be successful after completing their studies;
- encompasses a culture of human rights with respect to multi-lingual, multi-cultural diversity and a sensitivity to the values of reconciliation and nation building; and
- aims at producing thinking, competent future citizens (Van der Horst and McDonald 1997:10).

Scheffler and Rodseth (1999:4) believe that C2005 is fundamentally different from the school curriculum of the past, which was divided into discrete subject areas and largely content-based and teacher-driven. Curriculum 2005 is an outcomes-based curriculum with a special emphasis on the integration of subjects with learning areas.

The essential differences between the traditional curriculum, which was followed in South Africa and Curriculum 2005, as indicated by Vermeulen (1997:40), are displayed in Table 2.1 below.

Table 2.1: Essential differences between the traditional curriculum and Curriculum 2005

Traditional Curriculum	Curriculum 2005
Learners are passive in the learning process	Learners are active in the learning process
Exam/test-driven	Learners are assessed on an ongoing basis
Requires rote learning	Stresses critical thinking, reasoning, reflection and action
Syllabus is content-based and broken down into subjects	An integration of knowledge in learning areas where the learning is relevant and connected to real-life situations
Textbook/worksheet-bound and teacher-centred	Learner-centred; teacher is facilitator; teacher constantly uses group-work and team-work to consolidate the new approach
Sees syllabus as rigid and non-negotiable	Learning programmes seen as guides that allow educators to be innovative and creative in designing programmes
Educators responsible for learning; motivation depends on the personality of an educator	Learners take responsibility for their learning; pupils are motivated by constant feedback and affirmation of their worth
Emphasis on what the educator hopes to achieve	Emphasis on outcomes – learners' knowledge, attitudes and skills
Content placed within rigid time-frames	Flexible time-frames allow learners to work at their own pace
Learners are seen as empty vessels to be filled with the knowledge	Learners bring knowledge to the classroom
Curriculum development process not open to public comment	Comment and input from the wider community is encouraged

Adapted from Vermeulen (1997:40)

Spady and Marshall (1991:70) distinguish between Traditional, Transitional and Transformational OBE curriculae:

➤ **Traditional OBE**

Spady and Marshall (1991:67) state that the Traditional OBE curriculum does not deviate much from the traditional curriculum, but that OBE principles are applied to assist learners to achieve at higher performance levels.

➤ **Transitional OBE**

The Transitional OBE curriculum addresses higher order competencies essential to life and learning settings, and focuses on higher order exit outcomes. Subjects are also taught in an integrated manner (Spady and Marshall 1991:67).

➤ **Transformational OBE**

Spady and Marshall (1991:68) explains that the Transformational OBE curriculum prepares learners holistically for their roles and functions in society. It also aims at restructuring the educational system in order to redress inequities.

Transformational OBE clusters subjects into learning areas. Outcomes are formulated for each of these learning areas. South Africa has adopted the Transformational OBE curriculum to improve the educational future of all South Africans.

In OBE, as is the case with most other curriculum design systems, it is customary to structure the curriculum around a hierarchical framework of long-term and short-term outcomes. Curriculum 2005 introduced critical cross-field outcomes, which is a relatively recent innovation in curriculum design. Critical

outcomes are core performance indicators that guide lifelong learning (Spady 1994:51).

2.7.2 The adoption of the Revised National Curriculum Statement (RNCS)

Since the implementation of C2005 in 1997, South African educators experienced a substantial number of challenges (Jansen, 1998:326). These challenges acted as impediments to the implementation of C2005. Thus a Review Committee was set up as a mandate by parliament to investigate and make recommendations on means and ways of streamlining and strengthening C2005 (Bojanala West Region, 2003:1). The review committee recommended that strengthening C2005 required streamlining its design features and simplifying its language through the production of a Revised National Curriculum Statement (RNCS) (Shuter and Shooter, 2004:3). Among others, it was also strongly recommended that curriculum should be better aligned with assessment.

The RNCS keeps in tact the principles, purposes and thrust of C2005 and affirms the commitment to OBE. In short, the RNCS is not a new curriculum but a streamlining and strengthening of C2005 (Potchefstroom University, 2002:2).

The following diagram displays the essential differences between C2005 of 1997 and the Revised National Curriculum Statements for Grades R-9 (RNCS).

Table 2.2: Comparison of C2005 with the RNCS

Curriculum 2005	Revised National Curriculum Statements Grades R-9
Critical Outcomes	Critical and Developmental Outcomes
Specific Outcomes 66	Learning Outcomes 36
Range Statements	Assessment Standards
Assessment Criteria	
Performance Indicators	
Notional Time and Flexi Time	Time allocation
Continuous Assessment, Recording and Reporting	
Phase Organisers	Themes
Programme Organisers	
Expected Levels of Performance	
Learning Programmes	Learning Programmes

Adapted from DoE (2003:4 – 6)

As can be observed in Table 2.2 above, the RNCS has reduced the curriculum design features of C2005 and has also aligned the curriculum with assessment. The RNCS does not phase out the OBE approach but it has only revised and strengthened the C2005 and simplified its language (Potchefstroom University, 2002:3). Each Learning Area Statement identifies the main Learning Outcome to be achieved by the end of grade 9. Each Learning Area Statement also specifies the Assessment Standards that will enable the Learning Outcome to be achieved. Assessment Standards are defined for each grade, which, describe the depth and breadth of what learners should know and be able to do. Each Learning Area Statement's Assessment Standards indicates how conceptual and skill development can take place over time (DoE, 2003:2).

Baker, Francis and Salzwendel (2005:8) claim that outcomes are the end goals of learning, things that learners can do at the end of a programme. A competent learner is one who can use skills and knowledge to solve problems. The RNCS explains that education is aimed at developing the whole person. It has been decided that those main outcomes which shape learners as mature, developed people will cover all learning areas, from early childhood up through all educational levels. These main outcomes are called Critical Outcomes.

Cunningham (2005:13) describes the Critical Outcomes as envisaging learners who will be able to:

- identify and solve problems and make decisions using critical and creative thinking;
- work effectively with others as members of a team, group, organisation and community;
- responsibly and effectively organise and manage themselves and their activities;
- collect, analyse, organise and critically evaluate information;
- communicate effectively using visual, symbolic and/ or language skills in various modes;
- use science and technology effectively and critically, showing responsibility towards the environment and the health of others; and
- demonstrate an understanding of the world as a set of related systems by recognising that problem-solving contexts do not exist in isolation (Cunningham, 2005:13).

The above outcomes, as indicated above, enable the learners to develop the skills, knowledge, values and attitudes that will help them to contribute to their own success as well as to the success of their families, their community and South Africa as a whole. Critical Outcomes are also supported by Developmental Outcomes.

Developmental outcomes relate to the values and attitudes of the learners and have been identified by the Department of Education. Wallace, Thomson and

Maltby (2005:8) explain the developmental outcomes as envisaging learners who are able to:

- reflect on and explore a variety of strategies to learn more effectively;
- participate as responsible citizens in the life of local, national and global communities;
- be culturally and aesthetically sensitive across a range of social contexts;
- explore education and career opportunities; and
- develop entrepreneurial opportunities (Wallace *et al.*, 2005: 8).

Baker, Francis and Salzwendel (2005:6) explain that these Developmental Outcomes will help learners to develop into active citizens of the future who are able to make a contribution to society and to the economy of the country.

A further feature of OBE, as expressed in the RNCS, is Learning Outcomes. Learning outcomes are directly related to a learning area. There are thirty-six Learning Outcomes, whereby each Learning Area has a set of these Learning Outcomes. These Learning Outcomes describe the knowledge, skills, values and attitudes the learners need to develop in each Learning Area (Cunningham, 2005:12).

Shuter and Shooter (2005:6) indicate that learning outcomes should address skills, knowledge, values and attitudes (**SKAV**).

Knowledge – information, facts, theories and explanations

Skills – practical application of knowledge

Values – acceptable standards and norms of society; things a society holds to be important

Attitudes – characteristics of thinking, usually demonstrated through behaviour.

Each Learning Area statement has identified the main Learning Outcomes which are to be achieved by the end of the each phase.

2.7.3 The introduction and adoption of the National Curriculum Statement (NCS)

The National Curriculum Statement (NCS) is a new OBE curriculum proposed for grades 10, 11 and 12. The Department of Education introduced this new curriculum for grade 10 in 2006, grade 11 in 2007 and grade 12 in 2008. The curriculum, which will be introduced in South African schools during the next three years, is internationally benchmarked and will equip learners with the knowledge and skills to actively participate in, and contribute to a democratic South African society and economy (Pandor, 2005:27).

The National Curriculum Statement (NCS) requires that all learners from grades 10 to 12 should follow seven learning areas (DoE, 2005:8). Two of these learning areas must be South African languages. In addition to the two languages, all learners must offer either mathematics or mathematical literacy and all learners must offer Life Orientation. The proposed compulsory requirements of mathematics or mathematical literacy aims at ensuring that all learners are prepared for life and work in an increasingly technologically numerical and data-driven world.

DoE (2005:8) indicates that Life Orientation aims at building civic participation and understanding. In addition to these four compulsory learning areas, learners must choose three learning areas from a list of approved learning areas.

Pandor (2005:27) explained that NCS requires extensive reading and writing skills in all learning areas. It requires that learners think carefully about what they learn; that they have strong conceptual knowledge and are able to apply this in a variety of situations; that they are critical and curious learners and that they are aware of social, moral, economic and ethical issues which face South Africans and citizens around the world. This description of the intended curriculum sets out the vision the Department of Education has for high school graduates. However, the achievement of this vision will depend on the careful

planning and hard work which is demanded of all those involved in education, departments of education, higher education institutions, educators, school management teams, school governing bodies, parents and learners (Pandor, 2005:27).

2. 8 CRITIQUE DIRECTED AGAINST OBE IN SOUTH AFRICA

There are concerns as to whether OBE will be a success or a failure in South Africa. Arguments and concerns have been raised as to whether or not educators, learners and parents accept the implementation of OBE in South African schools. A number of these issues are addressed below.

Botha (2002:368) argues that responsibility, dedication and commitment on the part of many educators and learners in South Africa are lacking. Therefore, achieving the required knowledge, skills and attitudes to promote a prosperous and democratic country with a quality education system will require dedication from a number of key role players. Learners will have to accept more responsibility for their learning; educators will have to take full responsibility for careful planning and management of their learners' learning environment; and parents will have to become more involved in motivating and facilitating their children to learn (Botha, 2002:368).

Some of the concerns or criticisms raised by Jansen (1998:322) regarding OBE are as follows:

- the language and terminology of OBE are far too difficult for the under-resourced educators of South Africa;
- successful implementation of OBE depends on significant levels of in-service development for South Africa's severely under-qualified educators in order to prevent the outcomes from being trivialised into objectives typical of behaviourism;

- at all levels of the education system there is a high incidence of unprofessional practice, and it assumed that many of the educators and administrators are on a daily basis, severely under-prepared, under the influence of alcohol at work or absent altogether;
- OBE requires a radical revision of the system of assessment, which is after all a deeply entrenched system, institutionalised in external final year examinations, and thus resisting curriculum innovation;
- OBE threatens to atomise and fragment curriculum knowledge by organising knowledge around discrete competencies. OBE overlooks cross-curricular and inter-disciplinary demands encountered in a complex learning task;
- the way in which OBE is being implemented in South Africa with educators being marginalized as mere implementers, is objectionable;
- the unclear relationship between the curriculum and the country's economic efficiency. Even if OBE succeeds in the schools, it will not deliver economic competitiveness for South Africa; and
- the prerequisites for fundamentally changing the apartheid curriculum are not in place in terms of the resources in schools.

These concerns are also supported by researchers who believe that the implementation and success of OBE in South Africa could be difficult and a long process, because of the inequalities that were brought about by apartheid (Jansen, 1998:322).

2.9 SUMMARY

Outcomes-Based Education is an approach that introduced many changes in education, not only in South Africa, but also in other countries of the world. It is an approach that allows learners to explore their talents freely and independently.

As is the case in other countries of the world, OBE is also criticised in South Africa. Due to some of the criticisms directed against Curriculum 2005, it was reviewed and the revised curriculum was put into practice from grades R to 9. The National Curriculum Statements was introduced for grade 10 in 2006.

OBE is a great educational philosophy that suffers from poor implementation and a lack of solid background research (Bixler, 2004:13). Critics of OBE have demonstrated that they have the power to sway public opinion in their direction, and in order for OBE to succeed, its advocates need to address its critics with a solid, united front (Bixler 2004:13).

Jacobs (2001:279) states that the Education Labour Relations Council (ELRC) in South Africa has passed resolutions to detail the duties and responsibilities of all educators. The resolutions indicated that all educators are responsible for many different practices in the schools, including assessment. Assessment has been identified as one of the educator's essential responsibilities for the successfully implementing OBE in South African schools.

Aspects and issues related to OBE assessment will be further addressed in Chapter 3.

CHAPTER 3

OUTCOMES-BASED EDUCATION (OBE) ASSESSMENT

3.1 INTRODUCTION

Nowadays the concept Outcomes-Based Assessment (OBA) is familiar to most educators, learners and other stakeholders. OBA is commonly associated with the new paradigm shift in education as well as with the implementation of the Outcomes-Based Education in South Africa. Educators are complaining that OBA is difficult to put into practice and that they are not receiving sufficient training in OBA.

OBA can enhance the learner's motivation and competency, depending on how well and fairly it is implemented. It could also build positive effects on the new curriculum development implemented in South Africa. OBA and competence-based education are new concepts based not on teacher-centred methods of teaching which educators are used to but rather on learner-centred methods of teaching and assessing. This study explores what assessment is, including the assessment strategies, techniques, tools and methods. Assessment, a crucial issue to educators in South Africa, is therefore briefly discussed in this chapter.

3.2 ASSESSMENT: A CLARIFICATION OF CONCEPTS

Lloyd-Jones, Bray, Johnson and Currie (1999:1) state that assessment is an all-embracing term. It covers all the situations during which some aspects of a learners' education are measured, whether this is done by an educator, examiner, or indeed the learners themselves. Assessment is concerned with measuring performance during or following a programme of study. Assessment can take many forms and it can be argued that the more diversity of the assessment methods, the fairer the assessment is to learners. The art

of assessing therefore needs to embrace several different kinds of activities (Race, 1999:11).

Vermeulen (2002:81) defines assessment as a process which involves the collecting evidence against clearly defined criteria, evaluating evidence, recording, reporting, reflecting, and giving feedback. According to Van den Berg and de Boer (2000:109) assessment is described as monitoring a learner's progress, identifying areas where assistance is needed, developing the skills of the learner as well as evaluating the learner's progress.

Assessment is a strategy for measuring knowledge, behaviour or performance and values or attitudes. It is a data-gathering strategy. Assessment forms an integral part of teaching and learning, and is not simply just a means of monitoring or auditing how learners perform (Van der Horst and McDonald, 1997:170).

It is pointed out by Dreyer (2000:268) that assessment refers to the process of observing learning, describing, collecting, recording and scoring and interpreting information regarding a learner's learning. Fischer and King (1995:3) also state that assessment is an inclusive term for alternative assessment methods which examine the learner's ability to solve problems or perform tasks closely resembling authentic life situations. Phyne (1994:301) says that assessment is a planned process of gathering and synthesizing information relevant to the purpose of discovering and documenting the learners' strengths and weaknesses, planning and enhancing instruction, or evaluating learners' progress and making decisions about learners.

Airasian (1994:301) suggests that assessment should include the full range of information which teachers gather in their classrooms. This information will help teachers to understand their learners, monitor their instruction, and establish a viable classroom culture. Cliff and Imrie (1981:16) agree that assessment forms an integral part of any effective teaching programme and that it should be subject to planning and designing. It is an activity which arouses anxiety and stress in both educators and learners. A major source of

the anxiety and stress is the uncertainty regarding the manner in which the assessment task should be approached.

The DoE (1997:13) states that assessment is a way of finding out what a person knows, understands and thinks and what the person can do. Educators must choose a range of assessment tasks or activities which will afford learners opportunities to learn and demonstrate their skills, knowledge, values and attitudes (SKVAs).

Macmillan (2006:9) regards educators as good when they understand assessment and learn to become good assessors. Assessment is not something the educator does, marks, records and then forgets about or ignores. Assessment implies the following:

- assessment helps educators to make formal and informal judgements about learners' performance and progress on an everyday basis;
- assessment helps the educator to understand how the learner learns and what barriers to learning the learner may experience; and
- assessment informs the educator whether to speed up, slow down or change the method of teaching (Macmillan, 2006:9).

Some researchers claim that validity and reliability are the two most important characteristics of "good" assessment. It is therefore vital for educators to understand the concepts *validity* and *reliability* to guide their assessment practices. Validity and reliability describe the fairness of assessment (Killen, 2003:22).

Everyone is sensitive to being assessed therefore fairness is probably one of the most important principles of assessment, especially to learners. Assessment is fair when:

- learners know and understand the purpose of assessment;
- learners know and understand the criteria by which their demonstrations of learning will be assessed;

- there is no bias in the assessment items;
- there are clear links to appropriate learning outcomes; and
- learners have been given a reasonable opportunity to learn or prepare for whatever the educator is assessing (Macmillan, 2006: 16).

The effective application of validity and reliability depends upon a deep understanding of the meaning of these concepts and their implications. These two concepts are hence discussed.

3.2.1 Validity

A valid test is one which measures what it is intended to measure (Nelson Mandela Metropolitan University, 2006:13). The different aspects of validity which should be considered and adhered to during assessment activities are discussed below:

- *content-related validity*- assessment needs to be closely related to the content of the course presented. One of the most useful ways of determining whether or not a test is capable of providing a valid basis for making content-related inferences about learning is by evaluating the test by a panel of subject experts (Killen, 2003:7);
 - *curriculum validity* - there should be a clear idea of expected learning outcomes and these outcomes need to be justifiable in terms of the curriculum content (Lloyd-Jones, Bray, Johnson and Currie, 1999:51);
 - *criterion-related evidence* - educators might be interested to know whether learners' results in an assessment task are good predictors of their future performances (the criterion measure) (Killen, 2003:8);
 - *construct-related validity* – when constructing a test, educators need to be sure that it assesses aspects of the construct they have set out to test and not something else. For example, an assessment task which has been designed to assess reading comprehension must assess reading comprehension and not reading fluency.
-

Reliability of assessment is closely related to validity and will be discussed below.

3.2.2 Reliability

- Reliability is the extent to which an assessment activity would render the same results if conducted with the same learners under the same conditions. If a test measures something consistently it can be considered reliable (Nelson Mandela Metropolitan University, 2006:13). Reliability can be enhanced if clear criteria are formulated against which learner performance is measured. Explicit criteria which are understood by assessors and learners lead to greater reliability than complicated marking schemes. Creating and agreeing on sound and usable criteria is thus an important way of improving reliability (Maree and Fraser, 2004:36).
- Sieborger and Macintosh (1998:12) made it clear that assessment can never be completely valid and reliable. Some kinds of assessment have much validity, but they do not have much reliability. To be fair in assessment, the assessor must aim at as much validity and reliability as possible.

3.3 OUTCOMES-BASED ASSESSMENT (OBA)

The DoE (2001: 5) defines Outcomes-Based Assessment (OBA) as a process of gathering valid and reliable information (evidence) regarding the performance of the learner, on an ongoing basis, against clearly defined criteria, using a variety of methods, tools and techniques in different contexts. The DoE (Northern Province) (2000:2) defines assessment as a process of identifying, gathering and interpreting information regarding learners' achievements as measured against nationally agreed outcomes for a particular phase of learning. It is also indicated by the DoE (1997:1) that assessment is the process of determining whether a learner is competent, as measured against nationally agreed assessment standards. Assessment may

be seen as a process of generating and collecting evidence of achievement, evaluating this evidence against standards and recording the findings of this evaluation.

According to Jacobs (2001:282) teaching, learning and assessment in OBE are not separated but integrated. An entirely new approach is being implemented with assessment. OBE provides the framework for educators to implement assessment in their classrooms. Assessment is not something which is unique to South Africa, but rather a worldwide move towards more valid and reliable ways of assessment. Fischer and King (1995:3) regard assessment as an inclusive term for alternative assessment methods which examine learners' ability to solve problems or perform tasks which closely resemble authentic situations.

OBA is a continuous, planned process of gathering information regarding the performance of learners measured against the assessment standards of learning outcomes. It requires clearly defined criteria and a variety of appropriate strategies to enable educators to give constructive feedback to learners and to report to parents, and other interested people (Baran, 2000:1).

Van der Horst and McDonald (1997:189) list the following **advantages of OBA**:

- Outcomes-based assessment works well in responding to learners' diversity, including varying abilities, learning styles and cultural backgrounds;
- Outcomes-based assessment tends to be motivational in providing learners with tasks which they perceive as worthwhile, interesting and relevant;
- Outcomes-based assessment provides educators with a multidimensional, holistic view of learners' performance; and
- Outcomes-based assessment helps learners to learn how to monitor their own performance and provides a means of

communication between learners, parents and educators (Van der Horst and McDonald, 1997:189).

In the light of the above-mentioned advantages, it is therefore essential that all educators involved with assessment should have a clear understanding of OBA and its implementation. Table 3.1 provides a framework for understanding the essential differences between traditional assessment and OBA.

Table 3.1 The differences between traditional assessment and OBA

Traditional assessment	Outcomes-based assessment
Assessment usually occurs at the end of the learning event	Assessment is continuous and integrated in all OBE programmes
Tests are used to assess learner performance	A variety of assessment methods, strategies and tools are used to assess learner competence
The learner is perceived not to be able to assess his or her own performance	Self-assessment is an essential component of outcomes-based assessment
Assessment criteria are not defined or specified	Assessment criteria are clearly defined and specified for learners
Assessment is used to test theoretical knowledge of the learner	Assessment is used to assess what the learner is able to do in real-life situations
There is more emphasis on the role of the assessor than on the learner	There is more emphasis on the role of the learner than on the assessor
Assessment focuses only on the subject-related objectives	Assessment focuses on the critical cross-field outcomes and learning outcomes

From the above it is clear that OBA must be seen as an integral part of the teaching and learning process and not as an isolated activity. It is the responsibility of educators to know and understand the answers to the following questions:

- Why do educators assess?
- What should be assessed?
- When should assessment take place?
- Who should be involved in the assessment?
- How should assessment be conducted?

The questions will be dealt with in the subsequent following paragraphs.

3.4 WHY DO EDUCATORS ASSESS? THE PURPOSES OF OBA

Van der Horst and McDonald (1997:173) state that before educators can consider the “*how*” of assessment, they should know why they want to assess their learners.

According to Lubisi, Parker and Wedekind (1999:14) assessment is a process whereby the progress of the learner is monitored. It is a tool to inform curriculum planning and learning programmes. Educators assess to define each learner’s ability what learners know, understand and can apply, and it enables learners to form a judgement concerning the quality of their work. Educators ensure early identification of learners with special educational needs through assessment. Assessment informs future planning and target setting, and assists in evaluating teaching methods and materials (1999:14).

According to the DoE (1997:12) the purposes of OBA are to:

- monitor learner's progress through an area of learning so that decisions can be made concerning the best way to facilitate further learning in terms of expected knowledge, skills, attitudes and values;
- provide information regarding learning difficulties and remedial action necessary to support those learners who may be experiencing learning difficulties; and
- determine the progression of learners and not only to decide about their promotion (Pass/Fail/Conditional Transfer).

Shoma (1999:9) states that educators assess learners in order to monitor what learning has occurred, and to motivate learners to take learning seriously. In order to measure teaching effectiveness and to determine what knowledge has been gained, assessment should be done. Educators assess to decide on learners' progress and to measure the achievement of outcomes. Learners are assessed to establish what skills knowledge and values have been developed, and to maintain high standards. Assessment is conducted to establish what learners already know, and to diagnose learning problems.

Rowntree (1991:16) listed the following six reasons why educators assess learners: selection by assessment; maintaining standards; motivation of learners; feedback to learners; feedback to educators; and preparation for life.

AMESA (1999:20) and Geyser (2001:12) indicate that educators assess learners in order to gather information regarding them and to record their progress. The information gathered provides valuable feedback to learners on their strengths and areas of development and support needed. Dreyer (2000:268) believes that there are many purposes for assessing learners' performance, such as:

- we live in a society where people are appointed and employed on the basis of their qualifications;
- learners themselves need feedback to help them determine how they are doing;
- educators need feedback on how well learners are doing, so that they can adjust and develop their teaching;
- assessment is the major driving force which helps learners to get down to serious studying; and
- assessment maximises learners' access to knowledge, skills, attitudes and values, as defined in the National Curriculum Policy (Dreyer, 2000:268).

Stiggins (2002:761) maintains that assessment can also be used for learning. If assessment of learning provides evidence of achievement for public reporting, assessment for learning serves to help learners to learn more. Assessments of and for learning are both important. The effect of assessment for learning is that learners keep learning and remain confident that they can continue to learn at productive levels.

3.5 WHAT SHOULD BE ASSESSED?

What should be assessed is one of the other questions which guides and assists the educator when planning assessment activities. The performance and competency of the learners are assessed in terms of the Critical and Developmental Outcomes, Learning Outcomes and Assessment Standards suggested by the Department of Education (Potchefstroom University, 2000:3).

Macmillan (2006:3) suggests that the easiest, best and most effective way of ensuring that learners attain these outcomes is to assess them through various ways which give evidence of whether or not they have attained the outcomes.

Wallace et al. (2005: 14) also indicate that, it is not good to assess only what learners remember, because facts are easily forgotten. Learners should also be given chance to show what they can do. Educators also need to assess whether the learners are developing appropriate values and attitudes. Stein, Potenza, Beynon and Perlman (2004:9) add on that educators need to assess learners whether they have the skill of learning how to learn, skills of problem-solving, collecting information, communicating and leading.

3.5.1 Critical and developmental outcomes

Critical outcomes are broad, generic cross-curriculum indications of what learners are expected to achieve, which underpin the constitution and are adapted by SAQA (South African Qualification Authority). These outcomes should ensure that learners gain the skills, knowledge and values which will allow them to contribute to their own success as well as the success of their family and community and the nation as a whole. Seven critical outcomes and five additional developmental outcomes exist that support development and which should be applied to all learning areas (Hall, Holomisa, Lamont and Sekete, 2000:26; and White, 2000:101).

According to DoE (2006: 30) each of the critical and developmental outcomes has implications for classroom practice. For example: Critical outcome 1: Identify and solve problems and make decisions using critical and creative thinking requires educators to involve learners in problem-solving activities. It also requires educators to provide opportunities for learners to develop critical thinking skills, and to think creatively.

Table 3.2 describes the Critical Outcomes and the ways through which assessment indicates whether learners have attained these outcomes

Table 3.2: Critical Outcomes and assessment strategies

Critical Outcomes	Assessment strategies
Communicate effectively using visual, symbolic and or language skills in various modes	Use diagrams, sketches, pictures in the assessment and ask learners to interpret or explain in short answers, essays
Use science and technology effectively and critically showing responsibility towards the environment and the health of others	Present situations in which the learners must show how they would evaluate a situation and what decisions they would make about using science or technology
Work effectively with others as members of a team/organisation/community	Divide learners into different groups for tasks that require learners to divide the work and to share and collate their efforts. Assess how well the learners work together and achieve the set outcomes in different groups.
Organise and manage themselves and their activities responsibly and effectively	Give learners increasingly complex projects and assess how well they plan the project to ensure that they complete all aspects in time
Collect, analyse, organise and critically evaluate information	Set tasks with have a number of steps and which require learners to undertake research, to categorise the information.
Identify and solve problems and make decisions using critical and creative thinking	Set original increasingly complex problems or case studies and expect the learners to develop their own solutions to he problem
Demonstrate an understanding of the world as a set of related systems by recognising that problem-solving contexts do not exist in isolation.	Set assessment tasks which require depth of thinking, which are sufficiently complex, with several related scenarios.

Adapted from (Macmillan 2006:3)

3.5.2 Learning outcomes

The DoE (2003:14) states that a learning outcome is derived from the critical and development outcomes. Learning outcomes describe the knowledge, skills, attitude and values learners need to achieve during the course of a specific learning area with different learning activities. A set of learning outcomes should ensure integration and progression in the development of concepts, skills and values through the application of assessment standards. Learning outcomes refer to what the learners are able to do at the end of the learning experience. In each learning area a set of specific outcomes describes what learners will be able to do at all the levels of learning (White, 2000:102; and Vermeulen, 1997:47).

Vermeulen (2002:82) suggests that curriculum designers should group learning outcomes according to Bloom's **cognitive, affective and psychomotor** domains of learning.

- **The cognitive domain outcomes**

Killen (2002:268) states that the cognitive domain (concerned principally with mental processes) is also known as the information or intellectual field of learning. The cognitive outcomes describe the knowledge the learners are to acquire and the processing of information by the learner. They specify what the learners will be able to do intellectually as a result of learning. These outcomes range from memorisation of facts to the most complex processes of evaluation and assessment (Vermeulen, 2002:82).

Vermeulen (2002:82) adds that action verbs are useful tools for specifying learning outcomes at different levels of complexity. These verbs could be used by educators to set questions or assignments for their learners. These verbs describe the different cognitive behaviours which should be assessed. In the cognitive domain, the educator has to decide whether the learners should know, comprehend, apply, synthesise or evaluate. The

educator states these decisions in terms of what the learner must know and can do at the end of teaching and learning.

The levels of cognition, as suggested by Bloom and commonly known as Bloom's taxonomy of educational objectives, are described in Table 3.3

Table 3.3: Cognitive domain outcomes

Levels/Cognitive Process	What learners are required to do	Action words (verbs)
Knowledge Remember	Retrieve relevant knowledge from long-term memory	Define, outline, recall, list, recognise, match, define, memorise
Comprehension Understand, grasping the meaning	Construct meaning from information and concepts	Explain, summarise, paraphrase, discuss, give examples, identify
Application Generalise, using learning in new situation	Carry out a procedure or use a technique in a given situation	Apply, determine, solve, demonstrate, organise, show
Analysis Break down, discover	Separate information into parts and determine how they relate	Analyse, contrast, examine, differentiate, distinguish
Synthesis Compose, putting together to form a whole	Reorganise elements into a new pattern, create	Combine, design, construct, develop, plan, produce
Evaluation Judge, judging the value for a given	Make judgements based on criteria or standards	Appraise, criticise, judge, recommend, assess, critique

Adapted from Van der Horst and McDonald (1997:38)

- **The affective domain outcomes**

Killen (2002:268) contends that the affective domain (concerned primarily with feelings, attitudes and values) is known as the field of emotions, values and attitudes. The affective domain is more difficult to assess because of the personal and internal qualities of affect. This domain has levels of difficulty so that the educators may match their assessment to the learner's level of learning.

Van der Horst and McDonald (1997:117) believe that cognitive and affective domains are often integrated. For instance, the ability to compare or evaluate different responses (cognitive domain) usually goes hand in hand with the ability to take responsibility (level of characterisation in the affective domain).

Maree and Fraser (2004:85) state that the affective domain describes the attitudes; feelings and dispositions the learners are expected to develop. Educators believe that affective outcomes are difficult to measure; they frequently omit the affective from lists of outcomes. Much teaching is directed toward the development of beliefs, attitudes, and values. Educators should write outcomes which describe attitudes and feelings, because they want learners to care about the subject being taught and to grow from experience. If the subject is worth learning, it should have some impact on the lives of the learners and it should affect them in the intellectual ways. Affective domain outcomes should make the learners more understanding, more caring, more tolerant, more affective and more communicative (Vermeulen, 2002:82).

The five affective domain outcomes developed by Krathwohl are subsequently outlined in Table 3.4.

Table 3.4 Affective Domain Outcomes

Domain and Verbs	What learners are required to do	Assessment options
Receiving Take in, listen, become aware encounter	Learners become aware of and/or sensitive to something	Observations of learners' discussions, questionnaires
Responding React, reply, answer, comply	Learners become motivated to learn and willing to respond and adhere to certain practical rules	Observation of learners' participation Interviews
Valuing Accept, reject, esteem, regard, desire	Learners express a value orientation. It includes accepting a value and commitment to a value	Interviews, questionnaires Essay tests
Organisation Compare, order, prioritise	Learners develop a value system concerning personal relations with members of another cultural group	Observation of learners' choices
Characterisation Internalise, personalise, demonstrate	Learners practise what they preach. Their behaviour consistently reflects organised values	Learners' responsibility Learners' projects learner debate

Adapted from Killen (2002:271)

- **The psychomotor domain outcomes**

Killen (2002:268) describes the psychomotor domain (concerned with body movements and physical actions) as the field of conscious performance of physical actions. Vermeulen (2002:82) explains that the psychomotor outcomes relate to physical, manipulative and motor skills learners are to master. Learning to hold a pencil, to write, to play piano, to kick a soccer ball, to drive a bicycle or a car and to operate a machine all depend at least in part on manipulative and motor skills. Many learning difficulties are associated with an inability to use some part of the body effectively.

Killen (2002:268) states that Bloom's taxonomy provides a useful starting point for thinking about the things educators wish learners to achieve. The different domains are practical points of departure for exploring the idea that different types of learning require different approaches to teaching and assessment.

Table 3.5 describes the different levels of the psychomotor domain.

Table 3.5 Psychomotor Domain Outcomes

Domain	What learners are expected to do	Action Verbs (words)
Perception	Use senses (sight, touch,) to become aware of the environment and to make sense of this information.	Sense, has a feeling for,
Set	Prepare to respond to the external stimuli. Outcomes at this level will emphasise readiness to attempt a task.	Willing, prepared, watch
Guided response	Perform the motor act under close guidance. This involves imitation (trying to do what someone else has modelled) and trial-and error (trying various responses until an appropriate response is achieved).	Attend, interested,
Mechanism	Respond habitually but with limited confidence and proficiency	Practise, imitate
Complex overt response	Perform complex movement patterns quickly , confidently, skilfully and with relative ease	master, perform standard tasks
Adaptation	Create new movement patterns to fit particular situations or solve a specific problem.	Develop, variations,
Origination	Create new movement patterns to fit particular situation or solve problem	Create, able to

Adapted from Killen (2002:272)

Bloom's taxonomy can assist the educator when setting assessment tasks. The taxonomy looks at the ways in which the human mind naturally organises its knowledge of the world into systems. Bloom's taxonomy suggests which verbs the educators should use in the assessment tasks to ensure that learners think and to engage with the knowledge they have acquired at different cognitive levels; from lower-order to higher-order thinking skills (Macmillan, 2006:4).

3.5.3 Assessment Standards

According to the DoE (2003:14) assessment standards describe the level at which learners should demonstrate their achievement of learning outcomes and the ways (depth and breadth) of demonstrating their achievement. Assessment standards are grade specific and indicate how conceptual progression should occur in a learning area. They embody the knowledge, skills and values required to achieve learning outcomes.

3.5.4 Learning Programmes

Learning programmes are structured systematic arrangements of activities which promote the attainment of learning outcomes and assessment standards for the phase. Learning programmes are programmes of learning activities, including content and teaching methods. They are vehicles through which the curriculum is implemented and specify the scope of learning.

If the question as to assess could be answered by simply identifying the small, context-specific outcomes you wish your learners to achieve, by assessing learners' performance against these outcomes and using agreed criteria assessment could be genuine. If educators want to know what to assess, they should consider what evidence of achievement they will look for in terms of these outcomes and agreed criteria why they need assessment and what progress or additional skills are being assessed (Nelson Mandela Metropolitan University, 2006:52).

The DoE (2003:15) explains that learning outcomes and the assessment standards are cognitively dependent on and supportive of one another. The knowledge, skills, values and attitudes which are to be assessed must also be clearly stated, and the educator should know when to assess the learner's performance and achievement during the learning progress.

3.6 WHEN SHOULD LEARNERS BE ASSESSED?

White (2000:121) contends that assessment should be done on an on-going basis and should be guided by specific purposes. Assessment could be formal or informal. Learners learn at different rates and use different styles and therefore learners may be assessed at different times through a variety of methods. In OBA the focus is on the progress of learners towards the attainment of outcomes and not on the time needed for mastery of learning. The Continuous Assessment (CASS) model provides an answer to the question as to when to assess.

Dreyer (2000:269) indicates that CASS acknowledges that the instructional process cannot be changed unless educators change the assessment process. If learners are assessed in an ongoing manner, it means that the whole range of school and homework can be acknowledged. Continuous Assessment forms an integral component of education, and OBE requires educators to reduce their reliance on written tests and examinations. Educators have to increase their range of assessment styles; assessment styles have to be appropriate to the outcomes being assessed; and assessment has to be continuous (Mitchell, 2001:9).

The DoE (1997:6) and AMESA (1999:7) agree that continuous assessment is the approach to assess a range of learning processes and outcomes on an ongoing basis. Through this process, educators, learners and parents gain constant feed back on the learner's progress. It also assists educators in obtaining valid information regarding learners' placement and promotion.

Vermeulen (2002:80) adds that continuous assessment is an evaluation practice with a cumulative character through which a teacher compiles a profile of a learner's performance, skills and attitude by using a wide variety of assessment techniques such as class work, tests, assignments, projects, practical tasks, oral tests and observation.

The DoE (2001:132) and White (2000:13) refer to the following important **features of continuous assessment**. Continuous assessment:

- enables the facilitator to use any planned learning experience to assess learner achievement and progress;
- is an essential aspect of the total evaluation of every learner;
- takes place over a long period, virtually continuous;
- is diagnostic, enabling the facilitator to monitor strengths and to address the needs of the learner;
- sets well defined outcomes for the learners;
- is transparent, as learners are aware of the criteria against which they are assessed;
- involves assessment of knowledge, skills and attitudes, ensuring that the content is not the only focus; and
- ensures that learners are exposed to a wide range of assessment techniques, and ensures that summative assessment is not the only component of the evaluation.

AMESA (1999:21) supports these purposes by agreeing that educators should assess the learners continuously, whether at the beginning of a programme or during the course of a learning programme. The timing should be linked to the purpose of the assessment.

The Nelson Mandela Metropolitan University (2006:52) agrees with the above viewpoint and states that, since learners learn at different rates and in different ways, they should not necessarily be assessed at the same time and

in the same way, but learners should be assessed in an ongoing basis, both formally and informally, when the educator thinks learners are ready to show progress.

White (2000:123) and the DoE (2001:5) indicate that the overall purpose of continuous assessment is to support the development of the learner and to provide feedback to the teaching and learning process. Continuous assessment requires the integration of specific assessment types, namely baseline, formative, summative, diagnostic, systemic and alternative assessment.

CASS fulfils these main purposes of assessment, namely baseline, formative, diagnostic, summative, alternative and systemic assessment. The integration of the five assessment processes should also be included in the context of teaching and learning, (Potchefstroom University, 2000:4).

➤ **Baseline assessment**

Baseline assessment is usually conducted at the beginning of a phase, grade or learning experience to establish what learners already know and can demonstrate. It also assists educators in planning the learning programmes and learning activities (White, 2000:123; and DoE, 2001:14).

➤ **Summative assessment**

Summative assessment is formal and gives an overall picture of the learners' progress at a given time, for example at the end of a term or year. Summative assessment must be done to give formative feedback to the educator (White, 2000:123; and DoE, 2001:14).

➤ **Diagnostic assessment**

Diagnostic assessment is done as the need for it arises to determine the nature and causes of barriers/difficulties to learning experienced by specific learners. It is followed by guidance, appropriate support and intervention strategies or referral to specialists in the case of learners with special education needs (White, 2000:123; and DoE, 2001:14).

➤ **Systemic assessment**

Systemic assessment is an external way of monitoring the education system by comparing learners' performances to national indicators of learners' achievements. It involves monitoring learner's attainment at regular intervals, using nationally or provincially defined measuring instruments. Systemic assessment compares and aggregates information regarding learners' achievement so that it can be used to assist in curriculum development and evaluation of teaching and learning (White, 2000:123; and DoE, 2001:14).

➤ **Formative assessment**

Formative assessment is an informal and continuous type of assessment following a developmental approach. It monitors and supports the process of learning and teaching. It is done to inform educators and learners about their progress. Formative assessment determines learners' strengths and developmental needs in relation to particular outcomes or criteria (White, 2000:123; and DoE, 2001:14).

3.7 WHO SHOULD ASSESS?

The DoE (2003:5) and Pahad (1997:24) contend that the assessment process involves a partnership between educators, learners, parents and Educational Support Services (ESS) such as occupational and speech therapists and educational psychologists. Educators have the overall responsibility to assess

the progress of the learners. AMESA (1999:21) says that the teacher alone should not always do the assessment; therefore any of the following people could also be involved in assessment:

- learners could assess their own work (**Self assessment**);
- a member of the peer group could assess his/her peers' work (**Peer assessment**);
- the parent could be asked to assess a particular project (**Parent assessment**);
- groups could assess a specific task (**Group assessment**); and
- the educator could do the overall assessment (**Educator assessment**).

The different role players who can participate in the above-mentioned forms of assessment are hence discussed.

3.7.1 The Learners (Self-assessment)

Learners need to be taught how to assess their own work. Self-assessment encourages learners to assume more responsibility for their own work. Self-assessment requires learners to assess their progress, either in writing or in consultation with the teacher. Normally no grades are given, but learners are afforded the opportunity to reflect on their own efforts. The advantages of self-assessment are given below (Jacobs, 2001:285):

- Self-assessment helps learners to critically reflect on their work;
- If done properly, learners get a good idea of their progress;
- Self-assessment encourages learners to take responsibility for their own learning;
- Educators learn what learners value about their own work; and
- Educators can give learners meaningful feedback.

It is also emphasised by Hall, Holomisa, Lamont and Sekete (2000:25) and White (2000:124) that self-assessment will increase the motivation and commitment of learners in the learning process.

According to Hall et al., (2000:2) self-assessment can take the form of a mark, symbol or score, which learners allocate to their own products of learning. At the end of the lesson, period or unit, a learner should be able to say:

- Today I learned.(knowledge),
- I also learned to do..... (skills); and now
- I feel (attitudes, values and dispositions).

Sieborger and Macintosh (1998:64) indicate that self-assessment is largely concerned with formative assessment, involving learners in their own learning processes and helping them to better understand what is expected of them. Black (1998:123) indicates that self-assessment is a crucial component for developing complex understanding through reflective habits of mind. The development of self-assessment by learners is within the framework of formative assessment as an integral part of learning. The capacity of learners to judge their own work is more than a bonus in good formative assessment. According to Van der Horst and McDonald (1997:201) self-assessment deserves special attention from educators because many learners, particularly young children, may need assistance in learning how to assess their academic skills and performance appropriately.

Mitchell (2000:93) indicates that there are different forms of self-assessment by which learners may assess their own work by means of self-correction. Self-correction may take place before learners hand in items of the work. Learners could also sign a piece of work before they submit it.

Dreyer (2000:272) contends that self-assessment is the key to learner empowerment because it gives learners an opportunity to reflect on their own progress toward instructional objectives, to determine the learning strategies which are effective for them and to develop plans for their future learning.

It is advantageous for learners to be involved in assessment, but some disadvantages are also experienced when learners assess themselves.

Winchester (2002:13) stated the following points of criticism as directed against self-assessment:

- ◆ it is time-consuming for educators to check whether the learner has assessed the work fairly and correctly.
- ◆ it may increase educator workload in terms of briefing learners on the self-assessment process
- ◆ it might be discouraging for those learners whose work is not quite satisfactory, as they can feel that they will never achieve.
- ◆ some learners might experience the assessment as nothing else but a waste of time, and as less important to them.
- ◆ learners may feel that educators are hiding behind self-assessment instead of doing their own work.
- ◆ self-assessment may be perceived as unreliable.

3.7.2 A Member of the Peer Group (Peer assessment)

Learners may be asked to assess the work of their class-mates and this is called peer assessment. Peer assessment is normally done when learners assess each other's work. According to the DoE (1998:19) a peer is usually someone who is either of the same age as the other learner, or in the same grade at school or in a similar position. All learners who are in the same class are peers. Peer assessment encourages learners to take responsibility for and interest in each other's progress and it helps learners to learn from the process. Dryer (2000:273) indicates that the information gathered through peer assessment can be used by learners to make judgements on their own learning and the learning of their peers.

The advantages of peer assessment are listed below as indicated by Jacobs (2001:287):

- peer assessment is a real attempt at involving learners in the assessment process;

- it is a more transparent form of assessment, as it involves more than one person;
- group and pair activities are especially suited to peer and self-assessment; and
- learners are encouraged to help each other in peer activities.

The DoE (1997:26) describes peer assessment as the process of using learners to determine each other's achievement against clearly defined outcomes. White (2000:124) adds that learners should be constructively encouraged, to be positive when appraising group work. Educators should always give guidelines to avoid unnecessary criticism on trivial aspects of an activity.

It is good for learners to conduct peer assessment during their learning, but on the other hand, there are also some negative aspects attached to peer assessment. The disadvantages of peer assessment as identified by Jacobs (2001:287) are highlighted below:

- peer assessment is very time-consuming, as educators need enough time to explain peer assessment activities to learners;
- learners may allow friendship to influence their assessment, so that reliability may become an issue;
- learners may not perceive peer assessment as fair because of the possibility of being discriminated against; and
- it usually takes learners more or less a year to gain enough experience with peer assessment for it to become successful.

Educators should also implement group assessment activities in their classroom (DoE, 1998:18).

3.7.3 A Group (Group assessment)

According to the DoE (1997:28) group assessment takes place when groups within the class assess each other's performance on a given task according to specified criteria. An example of group work could be that a group assesses a drama, which another group is performing. Group-assessment can be conducted in different ways, for example:

Learner to group: this is where the performance of a group is assessed by individual learners against clearly defined outcomes. **Class to learner:** this is when the whole class assesses performance of individual learners.

Group to learner: this is when a group assesses an individual learner's performance.

Group to group: this is when the members of a group assess the group's performance (Swart, Craig, Muller, Kriek, Lotz, Gillmer and Pote, 2001:3).

According to Winchester (2002:12), the advantages of group assessment are that it:

- ◆ may provide motivation for learners to focus on both individual and group assessment and thereby develop in both areas;
- ◆ encourages group work, and groups sink or swim together;
- ◆ assists learners to develop skills in independent judgement, and negotiation skills become part of the learning process;
- ◆ helps clarify criteria to be used for assessment; and
- ◆ encourages a sense of involvement and responsibility.

Sieborger and Macintosh (1998:8) agree that group assessment is peer assessment conducted by a group of learners assessing together. Jacobs (2001:288) adds on that if group work is well organised, it is easier to assess and that educators should be encouraged to ask themselves assessment questions, such as:

- Do some of the learners prefer to work alone?

- Why is this so?
- Are the tasks clear enough?
- Was the task really collaborative (can only be resolved together)?
- How will I determine which learners do not enjoy group work?
- What reasons are there for this (Jacobs, 2001:288)?

Although group assessment has many advantages and also helps the educators to assess their learners easily and minimises the educators' work, there are still some disadvantages. Winchester (2002:11) listed the disadvantages of group work as follows:

- ◆ Stronger learners may be unfairly disadvantaged by weaker learners and vice versa;
- ◆ Many educators find group work difficult to organise;
- ◆ Discrepancies between tasks may slow down the progress of some learners;
- ◆ Some learners may be able to anticipate the questions by reading the group instructions;
- ◆ The likelihood of unintentional plagiarism increases; and
- ◆ Individual learner contributions are not necessarily reflected in the marks (Winchester, 2002:11).

In the same way that the educators involve learners in self, peer and group assessment, they can also involve parents in the assessment of their children's work.

3.7.4 The Parents (Parent assessment)

Traditionally the involvement of the parents in the schooling of their children was rather limited. To some parents the scholastic progress of the learner was the sole responsibility of the educator. The question may be asked: Who can be regarded as a parent figure?

According to Jacobs (2001:287), a parent refers to an older person who lives with and takes responsibility for a learner. This could be a grandmother, guardian, relative or even an older brother or sister. The school should invite parents to be more actively involved in their children's education by serving on school governing bodies (SGBs) or on parent-teacher committees. Another way to involve parents is to encourage them to participate in their children's assessment at school.

Fischer and King (1995:41) indicate that parents should be given opportunities to attend seminars, meet with teachers, join in ongoing curriculum development, and serve on assessment committees and read brochures and newsletter reports concerning performance assessment. The implications of using portfolios and other authentic measures of assessment should be discussed and parents should be invited to unofficial marking sessions.

Parent assessment should be encouraged regularly, and whenever possible, parents must be informed with regard to their children's progress. Parent assessment is also a useful way of stimulating teacher-parent interaction and communication (Hall *et al.*, 2000:33).

Jacobs (2001:287) indicates that parents can monitor their children's school work at home to find how they are progressing. Parents can write comments in their children's books to show their interest and concern. Learners should be encouraged to take their class work home, so that their parents can sign it. Parents who are illiterate or not conversant with the language of instruction at the school can still be involved in assessment. Their children can read and translate their work to their parents.

Stiggins (2002:762) states that educators can promote assessment for learning by actively motivating learners to talk with their educators and their parents about their scholastic achievement status and improvement. Parents become more involved and enthusiastic about their children's school work when there is good communication between themselves and their children concerning school related matters.

Self assessment, peer assessment, group assessment and parent assessment can be very useful to assist educators with assessment, but the educator remains the primary assessor (DoE, 1997:28).

3.7.5 The Educator (Educator assessment)

As primary assessors, educators have the responsibility to guide self, peer, group, and parent assessment. Sieborger and Macintosh (1988:57) believe that the educator has to decide which outcomes can be integrated and clustered to make learning and assessment more meaningful.

The DoE (1997:7) lists the following requirements for the educator as an assessor:

- to seek to develop learners' competence;
- to understand that assessment is an essential feature of the teaching and learning process and to know how to integrate it with teaching and learning;
- to come to an understanding of the purpose, methods and effects of assessment and to be able to provide helpful feedback to learners;
- to design and manage both formative and summative assessment in ways which are appropriate for the level of learning and meeting the requirements of accreditation bodies;
- to keep detailed and diagnostic records of assessment; and
- to understand how to interpret and use assessment results to feed into processes for the improvement of learning programmes.

Stiggins (2002:761) suggests that educators should assess by understanding and articulating in advance the achievement targets their learners are to achieve; informing their learners about their learning goals in terms which learners understand right from the very beginning of the teaching and learning process. Educators should become assessment literate to be able to

transform their expectations into assessment exercises and scoring procedures which accurately reflect learner achievement.

The DoE (1997:23) states that the educator should use different methods and different tools and techniques when assessing learners. Why do educators need to use different assessment tools and techniques? Learners learn at a different pace and have different learning styles and therefore may not be assessed at the same time, within the same context and in the same way.

3.8 HOW SHOULD ONE ASSESS?

Assessment must be undertaken by using a variety of suitable assessment tools and techniques which commensurate with the needs of the learners. Chosen assessment methods, tools and techniques must provide a range of opportunities for learners to demonstrate knowledge, skills, values and attitudes. Assessment can be done formally or informally (DoE, 2001:5).

The DoE (2001:6) further indicates that educators should select different assessment tools and techniques depending on the purpose of assessment. The tools and techniques must provide a range of opportunities for learners to demonstrate attainment of knowledge, skills, values and attitudes.

The DoE (1997:30) believes that there is room in an OBE environment to explore and implement different assessment techniques. An assessment technique refers to how educators generate evidence of learner performance.

White (2000:12) also states that a variety of assessment methods, tools, and techniques need to be used in the learning programmes. The assessment tools and techniques used for collecting evidence in a learning area should be designed to:

- reflect curriculum priorities;
- provide feedback which informs and guides instruction;

- be fair to all learners;
- provide results which are reliable and comparable across learners; and
- be administratively convenient and inexpensive (White, 2000: 12).

In OBE, evidence to prove that the learning outcomes have been achieved is required. The assessment tools and techniques used during teaching and learning should also be kept as proof of evidence (Mitchell, 2000: 94),

Assessment techniques which could be used or employed when planning assessment are hence displayed in Table 3.6

Table 3.6: Different Assessment Techniques

Techniques		
Portfolio	Investigation	Sculpture
Collage	Exhibition	Mind mapping
Rubric	Music/song	Tables
Project work	Simulations	Written presentation
Role play	Model making	(report, essays)
Test	Plans(houses)	Question papers
Research project	Conferencing	Sound cassettes
Assignments	Posters	Video cassettes
Survey	Maps	Questionnaires
Debate	Charts	
Argument	Panel discussion	
Interview	Scenario	
Drama	Practical demonstration	
Presentation	Story telling	
Physical activities	Oral presentation	
Construction and design	Painting	

Adapted from White (2000:14)

The portfolio is the only assessment technique which will be further discussed, as all the other assessment techniques and tools are kept in the portfolio as evidence and for the purposes of future reference. Whenever a departmental official, principal, educator and/or parents need evidence of the learner's work, a portfolio is the relevant evidence to be produced. In the following paragraphs the portfolio as one of the assessment techniques will be elaborated on.

3.8.1 What is a portfolio?

Sieborger and Macintosh (1998: 48) describe the portfolio as the most important assessment technique in which all the evidence of the learner's work is kept. A portfolio provides the educator with a picture of the progress a learner has made and it also provides examples of different types of tasks a learner has accomplished.

A portfolio is a living, growing collection of a learner's work – the learners carefully select each addition for a specific reason, which they will be able to explain. The overall purpose of the portfolio is to enable the learner to demonstrate his/her learning and progress to others. The greatest value of the portfolio is that, in compiling the portfolio, learners become active participants in the learning and assessment process (Kemp and Toperoff, 1998:2).

The use of portfolio as a means of authentic assessment has become widespread in the field of education. The primary value of portfolios is the assessment of learner achievement. They are useful because they provide a continuous record of learners' development which can be shared with others (Genesee and Upshur, 1996:100).

Furthermore, a portfolio is described as a meaningful collection of a learner's work to provide a fuller picture of what the learner has achieved (Dreyer, 2000:272). The portfolio must be a purposeful collection of a learner's work which tells the story of a learner's efforts, progress or achievement in a given

area over a period of time. According to the DoE (2001:14) a portfolio is a purposeful collection of a learner's work such as projects, journals, assignments, collages and reports on investigations. A learner's portfolio is not necessarily always stored in file folders, but can also be kept in boxes or binders, or any other means of collating the learner's work can also be used.

George (2004:1) describes portfolio assessment as a multifaceted process, because:

- It is continuous and ongoing, providing both formative and summative evidence for monitoring learners' progress toward achieving essential outcomes;
- It is multidimensional exhibiting a wide variety of artefacts and processes reflecting various aspects of learners' learning processes. It contains a variety of work samples and assessments of work done by the learner, peers, educators and even parents; and
- It provides for collaborative reflection, including ways for learners to reflect about their own thinking and problem solving processes and meta-cognitive introspection as they monitor their own learning and observe their emerging understanding of learning areas and skills.

3.8.1.1 How to develop or design a portfolio

Educators and learners can use numerous different steps to develop, create or design a portfolio. The following steps for developing or designing a portfolio are suggested:

- **Step 1:** *Determine the purpose of the portfolio assessment.* Before collecting any samples of learners' work, the first step in planning a portfolio would be to determine the purpose for conducting the

assessment and how the results will be used, (Navarrerte, Wilde, Nelson, Martinez and Hargett, 1990:102 and Moya and O'Malley, 2004:6).

- **Step 2: *Focus on specific outcomes.*** The material in a portfolio is most useful when each piece collected reflects progress toward a specific learning outcome of each learning area (Dreyer and Van der Walt, 1999:111).

- **Step 3: *Content selection.*** The contents of the portfolio can vary largely because of the wide selection of possible tasks and activities which can be used to reflect the learner's achievements and because the selection of activities is based on each individual educator's purpose for using portfolios (Dreyer and Van der Walt, 1999:112 and Moya and O'Malley, 2004:7).

- **Step 4: *Task selection for self-assessment.*** It is essential for an educator to identify performance tasks which will help learners develop the ability to self-assess their work and measure whether outcomes are being attained (Dreyer and Van der Walt, 1999:113 Pierce and O'Malley, 2004:17).

- **Step 5: *Content analysis.*** The educator should match the contents to specific learning outcomes. Standards and criteria for learner performance are necessary for reaching educational decisions such as entry/exit or pass/fail (Dreyer and Van der Walt, 1999:10 and Moya and O'Malley, 2004:7).

3.8.1.2 Characteristics of a model portfolio

The following five characteristics of a model portfolio, which could be used as a systematic assessment tool in instructional planning and learners' assessment, are given by Moya and O'Malley (2004: 3):

- **Comprehensiveness.** The potential for determining the depth and breath of a learner's capabilities can be realized through comprehensive data collection and analysis. A comprehensive approach uses both formal and informal assessment techniques.
- **Predetermined and systematic.** A sound portfolio procedure is planned prior to implementation. Each entry in the portfolio has a purpose, and the purpose is clearly understood by all stakeholders.
- **Informative.** The information in the portfolio must be meaningful to educators, learners, departmental officials and parents. It also must be serviceable for instruction and curriculum adaptation to learners' needs.
- **Tailored.** An exemplary portfolio procedure is tailored to the purpose it will be used for, to class-room goals and objectives and to individual learner assessment needs.
- **Authentic.** A good portfolio procedure provides learner information based on assessment tasks which reflect authentic activities used during class-room instruction (Moya and O'Malley, 2004: 3).

3.8.1.3 Requirements for the learner's portfolio:

Each learner should have one product portfolio per learning area. Each portfolio should have a front cover and table of contents, and the content should include at least five (5) ways of assessment as required per learning area (DoE, 2003:15).

The **front cover** of the learner's portfolio should include the following information

Fig 3.1 Portfolio front cover

Name: Bolpelo Matshidiso

Learning Area: LLC English

Grade: 9

Year: 2004

School: Reba Secondary

The **table of contents/index** of the learner's portfolio should reflect the following information as illustrated in Table 3.7:

Table 3.7 Table of contents: Portfolio

Task number	Date	Form of assessment	Topic	Level obtained	Educator's signature	Learner's special needs

According to the DoE (2004: 6), the work in the learner's portfolio will provide evidence as to whether the learner has achieved the outcomes assessed.

The learner, parent, educator and Department of Education should have access to the learner's portfolio.

3.8.1.4 Disadvantages of portfolios

Portfolios are good and important assessment techniques to be used, as they serve as useful future reference documents. However, portfolios also have some disadvantages.

Some of the disadvantages of portfolio assessments are:

- ◆ **Lower comparability and reliability.** Many performance-based assessments, including portfolios, do not easily translate into a single score or set of scores. It is difficult to implement assessment portfolios which meet the reliability requirements many school systems require (Rose, 2000:4).
- **Difficulty of ensuring standardized assessment conditions.** It is difficult to ensure that those portfolios accurately record and score learners' performance. When implementing portfolio assessments, performance conditions may vary and educator bias can affect learners' performance (Koca and Lee, 1988:6 and Rose, 2000:4).
- **Cost.** One hurdle in developing an assessment portfolio system is the ongoing expense. Designing, implementing and scoring portfolio items are labour intensive and therefore costly (Rose, 2000:4).
- ◆ **Scoring.** Scoring learners' work using predetermined criteria is more time-consuming than scoring a single-occasion, norm-referenced test. Deciding the content of portfolios can be more difficult than other assessment techniques (Koca and Lee, 1988:6 and Rose, 2000:4).

3.8.2 Tools for assessment

The records kept in portfolios are the tools for assessment (White, 2000:127). According to the DoE (1997:23), tools are records which the educators should keep in their portfolios. Educators should be able to use various tools for

reporting learner achievement against clearly defined outcomes. Tools should also be designed to cater for the assessment needs of all educators and learners.

Table 3.8 below gives examples of the different tools for assessment:

Table 3.8: Tools for assessment

Assessment tools	
Rubrics	Assignments grids
Journals	Observation sheets
Marking grids	Profiles
Check lists	Class lists

Adapted from White (2000:127)

Assessment tools should be developed while the educator prepares the assessment task, and not afterwards. It is worth taking some time to prepare good tools which will enable educators to assess quickly and consistently. The educator prepares only one tool, but assesses many learners with it (Macmillan, 2006:19).

Montgomery (2001:28) indicates that educators who plan authentic learning tasks often ask the following questions when they consider how to assess learners' work:

- What constitutes a quality learning process or product?
- Are the criteria for identifying exceptional work clear to the learners and to me?
- How do I know what the learners have learned as a result of completing a task?

Rubrics can provide the structure to answer the questions above in a clear and meaningful manner (Montgomery, 2001:28).

From the various types of assessment tools, as indicated in Table 3.9, rubrics will be the only tool to be further discussed, because most of the work

learners keep in their portfolios is assessed by means of a rubric. Each and every task educators give the learners to do should be accompanied by a clear and understandable assessment rubric.

3.8.2.1 Rubrics

The DoE (1997:29) describes a rubric as a set of criteria which is used to ensure that different parts of the task are assessed. A rubric can simply be a list of what is assessed, who assesses and what assessment keys are used.

Mitchell (2000:94) adds that a rubric is a set of assessment criteria which learners must receive when a task is given. Learners must know in advance what is expected of them, so that they do not work in the dark. They must realise that if they fail to take cognisance of these criteria, there is a likelihood that they might not perform well.

Dreyer (2000:279) believes that a rubric basically is a checklist of characteristics which makes it easier to assess the quality of a learning product. It identifies the traits and components which need to be present to indicate the extent to which a learning outcome is achieved. It specifies the required characteristics for each level of quality. Andrade (2001:2) states that a rubric is one authentic assessment tool which is designed to help educators when assessing learners. It is a formative type of assessment tool because it is used continuously for assessment and feedback purposes during the teaching and learning process.

3.8.2.2 Why do educators use rubrics?

Rubrics differ from traditional tools of assessment because they assess learners during the actual process of learning, clearly showing to them how their work is being assessed. Rubrics communicate detailed explanations of what constitutes excellence throughout the learning process and they provide a clear teaching directive. Rubrics help educators to clarify exactly what

learners need to achieve in terms of content and performance standards (Rose, 2000:5).

Andrade (2001:3) regards rubrics as powerful tools for both teaching and assessment. They can improve learner performance, as well as monitor it by making educators' expectations clear and by guiding learners in how to meet these expectations. The result is often a marked improvement in the quality of learners work and in that of learning. The advantages of using rubrics during assessment are further explained in the following section.

3.8.2.3 Advantages of using rubrics

Kniep (2004:3) contends that the advantages of using rubrics as assessment tools are as follows: Rubrics are a very efficient and effective form of authentic assessment because they measure both process and product. They show learners where they are in relation to where they need to be and provide the necessary scaffolding to improve the quality of their work. Rubrics also empower learners because they implement them for the purposes of peer and self-assessments Rubrics improve learners' products and therefore increase learning because they are clear about what makes a good final product and why.

Andrade (2001:2) in turn regards the following as advantages of rubrics: Rubrics help learners and educators to define quality. When learners regularly use rubrics to assess their work, they begin to accept more responsibility for the quality of the end product. Rubrics reduce the time educators spend on grading learners' work and it is easier for the educator to explain to learners why they were awarded the grade they received, and how they can improve the quality of their work. Once parents understand the rubric concept, they like it; because they know exactly what their children need to achieve in order to be successful Parents also find rubrics useful when helping their children with homework.

Andrade (2001:2) indicates several types of rubrics which can be used. The selection of the rubric is based on the purpose of the assessment.

3.8.2.4 Types of Rubrics

Andrade (2001:3) states that rubrics can be analytic or holistic, and they can be created for any learning area.

◆ Holistic Rubrics

A holistic rubric enables the educator to quickly score the overall process or product, without judging the component parts separately. A holistic rubric provides a single score based on an overall impression of a learner's performance, rather than scoring or analysing individual dimensions of a task (Andrade, 2001:3).

Table 3.9 gives an example of a holistic rubric

Table 3.9: Template for a holistic rubric

Code	Description
7	Demonstrates an outstanding understanding of the problem
6	Demonstrates a meritorious understanding of the problem.
5	Demonstrates a substantial understanding of the problem.
4	Demonstrates a adequate understanding of the problem.
3	Demonstrate an moderate understanding of the problem.
2	Demonstrate a elementary understanding of the problem.
1	Demonstrate a no understanding of the problem .

Adapted from the DoE (2006:105)

The example of a holistic rubric given above specifies the performance expected for the different levels of quality. These levels of quality may be ratings such as 7 (Outstanding), 6 (Meritorious), 5 (Substantial), 4(Adequate), 3 (Moderate), 2 (Elementary), and 1 (Not achieved) (DoE, 2006:112).

◆ **Analytical Rubrics**

Analytical rubrics are usually preferred when a fairly focused type of response is required for performance tasks where there may be one or two acceptable responses and creativity is not an essential feature of the learners' responses.

Macmillan (2006:20) states that the educator uses an analytical rubric to firstly assess separate, individual parts of a task, and then the educator adds the individual marks to obtain a total mark.

An example of an analytical rubric is presented in Table 3.10.

Table 3.10: Template for an analytical rubric

Criteria	Not achieved & Elementary 1&2	Moderate & Adequate 3 & 4	Substantial & Meritorious 5 & 6	Outstanding 7	Score
# 1	<u>Description</u> reflecting beginning level of performance	<u>Description</u> reflecting movement toward mastery level of performance	<u>Description</u> reflecting achievement of mastery level of performance	<u>Description</u> reflecting highest level of performance	
# 2	Description reflecting beginning level of performance	Description reflecting movement toward mastery level of performance	Description reflecting achievement of mastery level of performance	Description reflecting highest level of performance	
# 3	Description reflecting beginning level of performance	Description reflecting movement toward mastery level of performance	Description reflecting achievement of mastery level of performance	Description reflecting highest level of performance	
# 4	Description reflecting beginning level of performance	Description reflecting movement toward mastery level of performance	Description reflecting achievement of mastery level of performance	Description reflecting highest level of performance	

Adapted from DoE (2006:106)

The various levels of learner performance can be defined using either quantitative (numerical) or qualitative (descriptive) labels. If a rubric contains four levels of proficiency or understanding on a continuum, quantitative labels would range from 1 to 4, (Macmillan, 2006:20).

3.8.2.5 How to create or design a rubric

It is indicated by Kniep (2004:3) that rubrics are becoming increasingly popular amongst educators who move towards more authentic, performance-based assessments. Educators have to develop their own rubrics to reflect their own curriculum and teaching styles.

Kniep (2004:3) and the DoE (2003:22) suggest that educators should use the following steps when creating rubrics:

- **Step 1:** Re-examine the learning objectives to be addressed by the task. This allows you to match your scoring guide with your objectives and actual instruction.
- **Step 2:** Identify specific observable attributes you wish to see. Specify the characteristics, skills or behaviours you are looking for, as well as common mistakes you do not wish to see.
- **Step 3:** Brainstorm characteristics which describe each attribute. Identify ways to describe above average, average and below average performance.
- **Step 4(a):** For holistic rubrics, write thorough narrative descriptions for excellent work and poor work, incorporating each attribute. Describe the highest and lowest levels of performance, combining the descriptors for all attributes.
- **Step 4(b):** For analytical rubrics, write thorough narrative descriptions for excellent to poor work for each individual attribute. Describe the highest and lowest levels of performance, using the descriptors for each attribute separately.

- **Step 5(a):** For holistic rubrics, complete the rubric by describing other levels on the continuum which range from excellent to poor work for the collective attribute.
- **Step 5(b):** For analytical rubrics, complete the rubric by describing other levels on the continuum which range from excellent to poor work for each attribute.
- **Step 6:** Collect samples of learners' work which exemplify each level. These will help you score in the future by serving as benchmarks.
- **Step 7:** Revise the rubric, as necessary. Be prepared to reflect on the effectiveness of the rubric and revise it prior to its next implementation.

3.9 GUIDELINES FOR THE EFFECTIVE IMPLEMENTATION OF OBA

There are ten steps the educator could use to practise effective OBA in the class-room (Macmillan, 2006:26). These steps are:

- *Plan and prepare for assessment.* Educators prepare for assessment by taking into account the particular situation in their schools, the learning the learners have already done and the special needs of their learners.
- *Design or select an assessment task and the instrument for assessing the task.* Educators should make sure that all assessment tasks used in Outcomes-Based Education are in the line with the principles of Outcomes-Based Education. A range of different assessment methods should be used.
- *Consider the needs of learners who experience barriers to learning.* Alternative methods of assessment are necessary to provide all learners with equal opportunities by addressing the barriers they may experience. All learners must be given suitable opportunities to display their skills and knowledge.
- *Prepare learners for assessment.* A positive atmosphere is essential for good assessment. Ensure that learners understand the purpose and

importance of assessment. Tell the learners how you will be assessing them and provide them with the criteria you will use.

- *Conduct assessment.* When conducting assessment, the educator should make sure that the learners have everything they need before the assessment begins.
- *Evaluate learners using marks/codes/criteria/rubrics.* Assess the learner's work as soon as you receive it, so that you can give feedback while the task is still fresh in the learner's mind.
- *Provide feedback.* An assessment activity is not complete until the educator has given feedback to the learners. Give feedback specifically in terms of the criteria you set.
- *Record evidence of the learner's assessment activities.* Every time the educator assesses learners, a professional judgement or decision is made. All these judgements are recorded. The record forms the basis on which reporting is done to parents or guardians.
- *Report on the assessment.* Reporting is done against the Learning Outcomes of each of the Learning Areas, although a single code may be given for the entire Learning Area.
- *Review assessment.* Educators should review assessment activities to identify strengths and weaknesses in the assessment instruments and in the process of assessment. The review of the assessment activities should be kept in the educator's portfolio (Shuter and Shooter, 2005:5).

In addition to the above-mentioned steps, effective OBA, as summarised by Macmillan (2006:17) should be:

- **reliable:** decisions should be made in the same way for all learners when conducting an assessment activity an educator cannot be "harder" on one learner than on another learner ;
- **practicable:** an educator should take into account the available resources, facilities, equipment and time both in the class-room and at home;
- **authentic:** an educator should ensure that it is the learner's own work, or in the case of group work, that the learner has made a fair

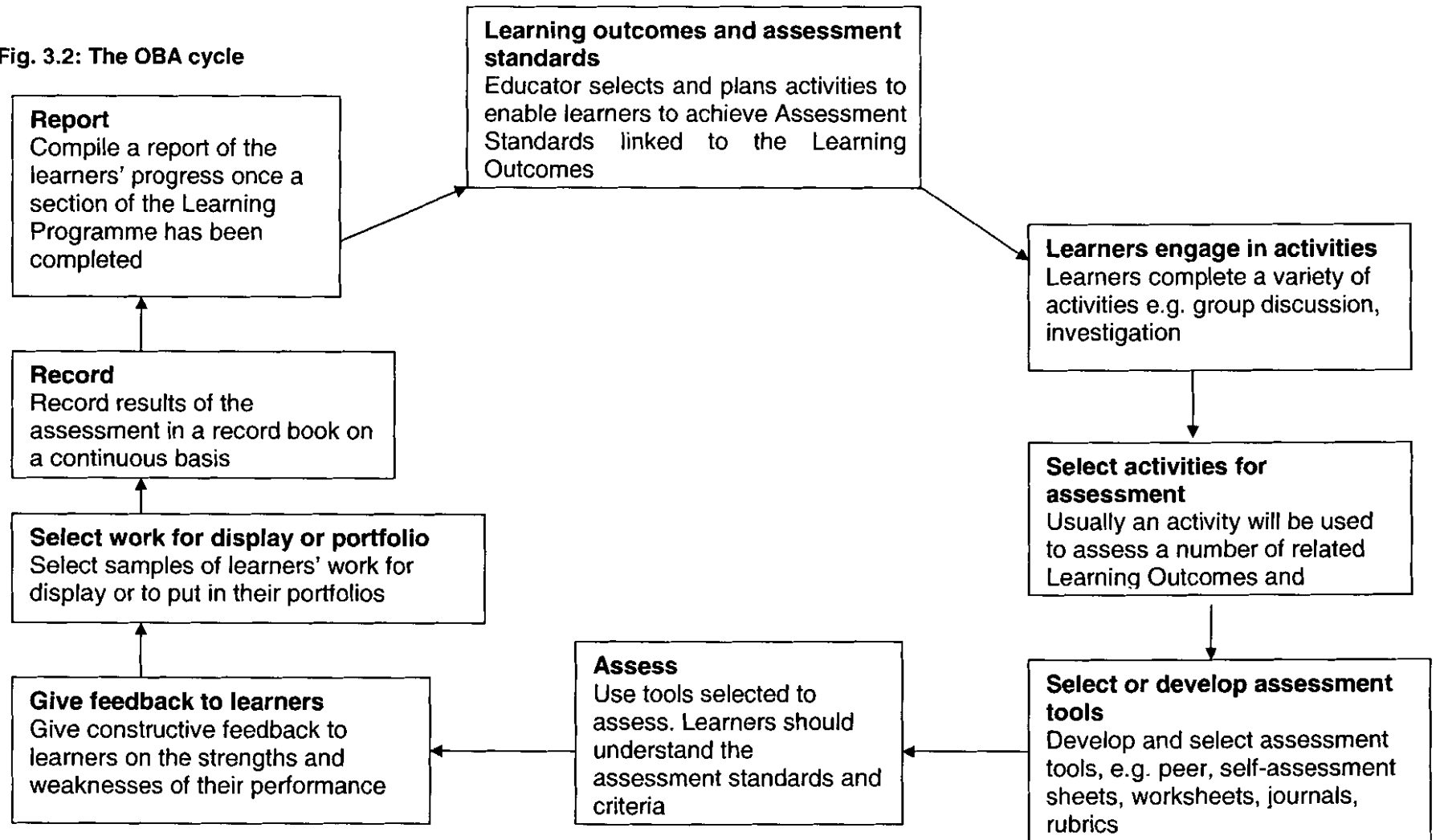
contribution to the end result. The assessment must also relate to the experiences of the learner in real life;

- **sufficient:** there must be enough evidence to assess learners. Assessment must challenge the learners to show that they can think and do;
- **manageable:** special care should be taken not to overburden the learners, or the educator, with the number of assessments;
- **transparent:** learners must know what outcomes the educator will be assessing, when they will be assessed, how they will be assessed and how their tasks will be marked;
- **valid:** the educator must ensure that the assessment is indeed assessing what it is intended to assess and that the *right* decisions are made, based on the assessment; and
- **integrated:** the educator should plan for assessment activities as an integral part of the teaching and learning process.

3.10 THE OBA CYCLE

The question as to how OBE assessment should take place can best be answered and summarized by the following assessment cycle illustrated in Fig. 3.2 (Adapted from Aitken, Harris, Keal, Krone and Moore, 2005:132).

Fig. 3.2: The OBA cycle



Adapted from MacMillan (2006:176)

3.11 SUMMARY

In this chapter, the concept *Assessment* was clarified with specific reference to the concepts *validity* and *reliability*.

Furthermore, Outcomes-Based Assessment (OBA) was discussed in terms of the following questions:

- *Why do educators assess?*
- *What should be assessed?*
- *When should learners be assessed?*
- *Who should assess? and*
- *How should one assess?*

The chapter concluded with guidelines for effective implementation of OBA and a diagrammatic overview of the OBA cycle.

The method of research will be discussed in Chapter 4

CHAPTER 4

METHOD OF RESEARCH

4.1 INTRODUCTION

In Chapters 2 and 3, a theoretical basis was laid for the empirical part of this research.

Chapter 2 dealt with Outcomes-Based Education within the South African context. The differences between traditional and outcomes-based didactic approaches, as well as between Curriculum 2005, the Revised National Curriculum Statements and the National Curriculum Statements were also highlighted in this chapter.

Outcomes Based Assessment (OBA) was discussed in Chapter 4 and the chapter concluded with guidelines for the effective implementation of OBA.

The method which was implemented in the empirical part of the research will be discussed in this chapter.

4.2 RESEARCH DESIGN

In order to answer the research question and achieve the aim of the empirical research, a research survey was undertaken. A research survey implies that research of a non-experimental nature is conducted and that a data collection instrument is used to collect information from a sample of individuals (Wiersma, 1995:145-146). In this investigation, the perceptions of a representative sample of educators regarding OBA was surveyed by means of a questionnaire (Please consult Appendix A for a copy of the questionnaire).

4.3 RESEARCH PROBLEM

The researcher wished to throw more light on the following research question:

How do educators perceive OBA and the implementation thereof?

4.4 RESEARCH AIM

In accordance with the above-mentioned research question, the aim of the research was to determine how educators perceive OBA and the implementation thereof.

4.5 STUDY POPULATION AND PARTICIPANTS

A study population refers to a particular group of persons or subjects whilst a sample consists of participants who have been selected in a particular way from the population (McMillan and Schumacher, 1993:159). According to Bailey (1994:89), simple random sampling is the best known of the probability sampling procedures. When a simple random sampling procedure is used all members of the study population stand an equal and independent chance of being included in the sample.

With the permission of the Department of Education of the North-West Province, this research was conducted in the Bojanala West Region of the North West Province. The study population included educators who taught in schools of all four educational Area Project Offices (APOs) in this region. From a list of all the schools in the Bojanala West Region (n = 345), a random sample of 220 schools was drawn. From each of the selected schools, one educator was selected randomly (irrespective of his/her position, age, gender or qualifications) to complete the questionnaire.

From the 220 educators who were randomly selected to respond to the questionnaire, 195 usable questionnaires were returned, which gives a response rate of 88,6 %. Biographical details concerning the respondents are displayed in the following table.

Table 4.1: Biographical details concerning the respondents

Age Of Respondents	f	%
30 and below	4	2.1
31 – 35	27	13.8
36 – 40	47	24.1
41 – 45	56	28.7
46 – 50	36	18.5
51 and above	25	12.8
Total	195	100
Gender	f	%
Female	142	72.8
Male	53	27.2
Total	195	100
Teaching experience	f	%
5yrs and below	7	3.6
6 to 10 yrs	34	17.4
11 to 15 yrs	53	27.2
16 to 20 yrs	36	18.5
21 yrs and above	65	33.3
Total	195	100
Settlement Type	f	%
Rural	142	72.8
Urban	53	27.2
Total	195	100
Academic Qualifications	f	%
Standard 10 plus professional qualification	90	46.2
Bachelor's degree plus professional qualification	43	22.0
B.A.Ed/B.Sc Ed	19	9.7
Honour's degree	33	16.9
Master's degree	6	3.1
Others (Specify).....	4	2.1
TOTAL	195	100

The biographical information in Table 4.1 indicates that:

- The majority of respondents were mature (97.9% were older than 31 years) and experienced educators (79.0% had more than 11 years of teaching experience);
- There were more female (72.8%) than male educators (27.2%) in the sample, which reflects the gender composition of the South African educator population;
- Most of the educators in the sample (72.8%) taught in rural schools. This can be ascribed to the fact that there are more rural than urban schools in the Bojanala West Region of the North-West Province; and
- The respondents were professionally well educated: 51.7% of them were in possession of a Bachelor's degree or a Bachelor's degree plus a professional teaching qualification, and/or an Honour's or Master's degree.

4.6 DATA COLLECTION

McMillan and Schumacher (1993:134) indicate that the tools employed in the collection of data in surveys are normally questionnaires and individual interviews.

For the purposes of this study a structured questionnaire (Please consult Appendix A for a copy of the questionnaire) was used to collect information from the respondents, as questionnaires are the most commonly used instruments for collecting data from a prepared sample (Borg and Gall, 1989: 56).

4.6.1 The questionnaire

The questionnaire was divided into three (3) sections:

Section A consisted of items 1 to 6, with the purpose to collect biographical and demographical data from each respondent.

Section B consisted of sub-sections B1 to B5 and the purposes of these sub-sections were to survey the respondents' perceptions regarding the following aspects:

- B1: Outcomes Based Assessment (OBA) Policy (3 items);
- B2: Outcomes Based Assessment (9 items);
- B3: Learner Self-assessment (4 items);
- B4: Peer Assessment (5 items); and
- B5: Parental Participation in and Support for OBA (4 items).

The respondents were requested to answer each item by selecting a response category from a four-point scale which best reflects their perceptions/opinions regarding the content of the particular item.

Section C consisted of four items. The first three items were formulated in such a way that the respondents could express their perceptions and opinions regarding OBA on a two-point scale (Yes/No). Immediately below these items, space was provided for respondents to motivate the choice of their responses.

The fourth item was formulated in such a way as to elicit open responses from the respondents regarding the problems or challenges that they had encountered in the implementing of OBA.

4.6.2 Administration of the questionnaires

As stated previously in paragraph 4.5, permission to conduct the research in the selected schools was granted by the managers of the different Area Project Offices (APOs).

On the basis of the information provided by the regional offices, especially with regard to the geographical location of the schools, the researcher was able to deliver the questionnaires directly to the selected schools. The researcher spoke to the principals of the selected schools and briefed them on the nature and purpose of the research and also requested them to encourage the educators at their schools to participate in the research and to complete the questionnaires. The researcher collected most of the completed questionnaires directly from the schools and in other cases arrangements were made with school principals to drop the completed questionnaires at their respective APOs.

The completed questionnaires were handed in at the Statistical Consultation Services department of the North-West University (Potchefstroom Campus) for data capturing and analysis.

4.6.3 Data analysis

In order to determine how the participants perceived OBA and the implementation thereof, participants' responses to the various items in the different sections of the questionnaire were tabulated and presented in frequency tables. Descriptive statistics (means and standard deviations) were also calculated.

The participants' responses to the open ended items in Section C of the questionnaire were categorized and frequencies were calculated for each category.

4.7 SUMMARY

In this chapter, the method of research was discussed in terms of the research problem and aim, study population and participants, and data collection and analysis.

The results and findings of the research will be discussed in Chapter 5.

CHAPTER 5

RESULTS, CONCLUSIONS AND RECOMMENDATIONS

5.1 INTRODUCTION

In Chapter 4, the research method was discussed in terms of the research design, research problem and aim, the study population and participants and the data collection procedure.

In this chapter, the results (quantitative and qualitative) emanating from the survey will be presented and conclusions will be drawn regarding the participants' perceptions of OBA. Based on this, recommendations will be made.

5.2 PERCEPTIONS OF OBA: QUANTITATIVE RESULTS

Participants' responses to the various structured items contained in Sections B and C of the questionnaire will be presented in the form of frequency tables.

5.2.1 Participants' perceptions of an OBA policy

The participants' perceptions of an OBA policy are reflected in Table 5.1 below.

Table 5.1: Participants perceptions regarding an OBA policy

Section B1	Response	SA	A	D	SD
Item	Frequency (%)	f (%)	f (%)	f (%)	f (%)
1	Schools must draw up an OBE policy	120 (61.5%)	67 (34.3%)	4 (2.1%)	4 (2.1%)
2	The policy should be drawn up by all relevant stakeholders	48 (24.6%)	74 (37.9%)	40 (20.5%)	33 (17.0%)
3	The OBA policy assists educators to cope with the challenges brought about by OBA	43 (22.1%)	109 (55.9%)	22 (11.2%)	21 (10.8%)

SA=Strongly Agree A=Agree D=Disagree SD=Strongly Disagree

The responses in Table 5.1 indicate that:

- 95.8% of the respondents strongly agree and agree that schools must draw up an OBA policy;
- 62.5% of the respondents strongly agree and agree that the OBA policy should be drawn up by all the relevant stakeholders, and
- 78.0% of the respondents strongly agree and agree that the OBA policy assists educators to cope with the challenges brought about by OBA.

5.2.2 Participants perceptions of OBA

Information regarding participants' perceptions of OBA can be found in Table 5.2 below.

Table 5.2: Participants' perceptions of OBA

Section B2	Response	SA	A	D	SD
Item	Frequency (%)	f (%)	f (%)	f (%)	f (%)
1	OBA can be time consuming	55 (28.2%)	59 (30.3%)	44 (22.6%)	37 (18.9%)
2	OBA can hamper the rate of progress of faster learners	45 (23.1%)	57 (29.2%)	63 (32.3%)	30 (15.4%)
3	OBA may de-motivate learners because codes (beyond achieved, achieved, partially achieved, not achieved) are awarded to their efforts rather than marks, percentages or symbols	68 (34.9%)	52 (26.6%)	51 (26.2%)	24 (12.3%)
4	OBA can involve a huge amount of paper work and record keeping	134 (68.7%)	46 (23.6%)	12 (6.2%)	3 (1.5%)
5	OBA requires the commitment of all stakeholders in order to improve the quality of assessment	98 (50.3%)	87 (44.6%)	8 (4.1%)	2 (1.0%)
6	OBA provides the necessary focus for improvement in teaching and learning	41 (21.0%)	114 (58.5%)	27 (13.8%)	13 (6.7%)
7	OBA may lead to a situation where educators assess learners simply for the sake of assessment	60 (30.8%)	39 (20.0%)	43 (22.0%)	53 (27.2%)
8	Educators should use a variety of assessment types when implementing OBA	52 (26.7%)	92 (47.2%)	33 (16.9%)	18 (9.2%)
9	Educators understand the main purpose of continuous assessment (CASS)	50 (25.6%)	84 (43.1%)	44 (22.6%)	17 (8.7%)

SA=Strongly Agree A=Agree D=Disagree SD=Strongly Disagree

The responses in Table 5.2 indicate that:

- 58.5% of the participants strongly agree and agree that OBA can be time consuming;
- 52.3% of the participants strongly agree and agree that OBA can hamper the progress of faster learners;
- 61.5% of the participants strongly agree and agree that OBA may demotivate learners because codes are awarded;
- 92.3% of the participants strongly agree and agree that OBA can involve a huge amount of paper work and record keeping;
- 94.9% of the participants strongly agree and agree that OBA requires the commitment of all stake holders in order to improve the quality of assessment;
- 79.5% of the participants strongly agree and agree that OBA provides the necessary focus for improvement in teaching and learning;
- 50.8% of the participants strongly agree and agree that OBA may lead to a situation where educators assess learners simply for the sake of assessment;
- 73.7% of the participants strongly agree and agree that educators should use a variety of assessment types when implementing OBA; and
- 68.7% of the participants strongly agree and agree that educators understand the main purpose of continuous assessment (CASS).

5.2.3 Participants' perceptions of learner self-assessment

Information regarding participants' perceptions of learner self-assessment is displayed in Table 5.3 below

Table 5.3: Participants' perceptions of learner self-assessment

Section B3	Response	SA	A	D	SD
Item	Frequency (%)	f (%)	f (%)	f (%)	f (%)
1	Self-assessment helps learners to think critically about the quality of their own work or efforts	70 (35.9%)	89 (45.6%)	25 (12.8%)	11 (5.7%)
2	Self-assessment is not so reliable as educator assessment	29 (14.9%)	103 (52.8%)	51 (26.2%)	12 (6.1%)
3	Some learners regard self-assessment as a waste of time	27 (13.9%)	80 (41.0%)	71 (36.4%)	17 (8.7%)
4	Learners feel that educators use self-assessment as an excuse to neglect their own assessment responsibilities	31 (15.9%)	79 (40.5%)	66 (33.9%)	19 (9.7%)

SA=Strongly Agree A=Agree D=Disagree SD=Strongly Disagree

The responses in Table 5.3 indicate that:

- 81.5% of the participants strongly agree and agree that self-assessment helps learners to think critically about the quality of their own work or efforts;
- 67.7% of the participants strongly agree and agree that self-assessment is not as reliable as educator assessment;
- 54.9% of the participants strongly agree and agree that some learners regard self-assessment as a waste of time, and
- 56.4% of the participants strongly agree and agree that learners feel that educators use self-assessment as an excuse to neglect their own assessment responsibilities.

5.2.4 Participants' perceptions of peer assessment

Information regarding participants' perceptions of peer assessment is revealed in Table 5.4 below.

Table 5.4: Participants' perceptions of peer assessment

Section B4	Response	SA	A	D	SD
Item	Frequency (%)	f (%)	f (%)	f (%)	f (%)
1	Peer-assessment is a more transparent method of assessment than educator assessment	40 (20.5%)	121 (62.1%)	25 (12.8%)	9 (4.6%)
2	Peer assessment promotes co-operative learning	72 (36.9%)	107 (54.9%)	14 (7.2%)	2 (1.0%)
3	Learners perceive peer-assessment as a fair method of assessment	21 (10.8%)	101 (51.8%)	64 (32.8%)	9 (4.6%)
4	Friendship may influence the reliability of peer assessment	36 (18.5%)	115 (58.9%)	39 (20.0%)	5 (2.6%)
5	Peer assessment is more objective Than self-assessment	22 (11.3%)	121 (62.1%)	42 (21.5%)	10 (5.1%)

SA=Strongly Agree A=Agree D=Disagree SD=Strongly Disagree

The responses in Table 5.4 indicate that:

- 82.6% of the participants strongly agree and agree that peer-assessment is a more transparent method of assessment than educator assessment;
- 91.8% of the participants strongly agree and agree that peer assessment promotes co-operative learning;
- 62.6% of the participants strongly agree and agree that learners perceive peer-assessment as a fair method of assessment;
- 77.4% of the participants strongly agree and agree that friendship may influence the reliability of assessment; and

- 73.4% of the participants strongly agree and agree that peer-assessment is more objective than self-assessment.

5.2.5 Participants' perceptions of parental participation in and support for OBA

Information regarding participants' perceptions of parental participation in and support for OBA as reflected in Table 5.5 below.

Table 5.5: Participants' perceptions of parental participation in and support for OBA

Section B5.	Response	SA	A	D	SD
Item	Frequency (%)	f (%)	f (%)	f (%)	f (%)
1	Parents assist learners with OBA activities (e.g. parent assessment) at home	15 (7.7%)	52 (26.7%)	79 (40.5%)	49 (25.1%)
2	Parents are tired of assisting learners with their school work at home	47 (24.1%)	76 (38.9%)	44 (22.6%)	28 (14.4%)
3	Parents find it difficult to assist their children with their school work at home because they lack the knowledge to do so	75 (38.5%)	81 (41.5%)	23 (11.8%)	16 (8.2%)
4	Parents think that educators use parental participation and support as an excuse to neglect their teaching responsibilities	71 (36.5%)	73 (37.4%)	35 (17.9%)	16 (8.2%)

SA=Strongly Agree A=Agree D=Disagree SD=Strongly Disagree

The responses in Table 5.5 indicate that:

- 65.6% of the participants strongly disagree and disagree that parents assist learners with OBA activities (e.g. parent assessment) at home;
- 63.0% of the participants strongly agree and agree that parents are tired of assisting learners with their school work at home;

- 80.0% of the participants strongly agree and agree that parents find it difficult to assist their children with their school work because they lack the knowledge to do so at home, and
- 73.9% of the participants strongly agree and agree that parents think that educators use parental participation and support as an excuse to neglect their teaching responsibilities.

5.2.6 Concluding perceptions regarding OBA

Participants' concluding perceptions regarding OBA are displayed in Table 5.6 below.

Table 5.6: Concluding perceptions regarding OBA

Section C	Response	Yes	No
Item	Frequency (%)	f (%)	f (%)
1	Would you like to undergo further training in OBA?	174 (89.2%)	21 (10.8%)
2	Are you comfortable with the implementation of OBA?	26 (13.3%)	169 (86.7%)
3	The previous system of tests and examinations worked better than OBA	137 (70.3%)	58 (29.7%)

The responses in Table 5.6 indicate that:

- 89.2% of the participants would like to undergo further training in OBA;
- 86.7% of the participants do not feel comfortable with the implementation of OBA; and
- 70.3% of the participants feel that the previous system of tests and examinations worked better than OBA.

5.3 PERCEPTIONS OF OBA: QUALITATIVE RESULTS

In Section C (Concluding perceptions regarding OBA) of the questionnaire, the dichotomous (Yes/No) items 1 to 3 were followed up by open-ended “*Why*” questions where the participants had to motivate their responses to the particular items. These motivations were collated and categorized and are given below.

5.3.1 The need to undergo further training in OBA

As indicated in Table 5.6, the majority of participants (89.2%) expressed the need for further training in OBA. Their need for further training was motivated as follows:

- **Inadequate training:** The participants stated that the duration of departmental training period was too short for educators to be clear about implementing OBA. They do not know when to assess, what to assess and how to assess. The participants expressed the need to gain more knowledge of clearly defined assessment criteria and appropriate assessment strategies in order to give constructive feedback to learners and parents. The need for regular in-service departmental training programs on OBA assessment was also expressed by the participants.

5.3.2 Being uncomfortable with the implementation of OBA

As indicated in Table 5.6, the majority of the participants (86.7%) stated that they felt uncomfortable with the implementation of OBA. The following reasons were given for their lack of comfort:

- As indicated above, participants complained about inadequate training and expressed the need for further training on the implementation of OBA;

- Lack of departmental support and guidance with the implementation of OBA;
- Inadequate knowledge and experience regarding the implementation of OBA and the assessment of cognitive, affective and psycho-motor outcomes; and
- Inadequate knowledge and experience of assessment strategies and techniques to assess learners with barriers to learning and to cater for diverse learning needs.

5.3.3 Traditional assessment versus OBA

As indicated in Table 5.6, the majority of participants (70.3%) stated that the previous (traditional assessment system) of tests and examinations worked better than OBA. The following reasons were given for this opinion:

- Educators knew *what, when* and *how* to assess when implementing the traditional assessment system;
- Learners were more motivated to learn hard for tests and examinations, because their efforts were awarded with marks, symbols or percentages in stead of codes which qualitatively describe their performance;
- Learners had to perform individually and there was no group work and "window dressing" to rely on;
- Learners felt more confident and better informed about the quality of their work and progress;
- Learners studied facts and their basic scholastic skills (reading, writing and arithmetic) were better developed; and
- OBA is "technically" inadequate and it seldom leads to effective teaching and learning.

5.3.4 Specific problems or challenges participants have encountered with the implementation of OBA

On the basis of their teaching experience, participants could answer the open-ended Question 4 in Section C of the questionnaire by stating any specific problems or challenges they have encountered with the implementation of OBA. These problems or challenges were categorized and are reflected in their response frequencies in Table 5.7 below.

Table 5.7: Problems/challenges encountered with the implementation of OBA

Problems/Challenges	f	%
Lots of administrative/paper work (planning, assessing, recording)	58	29.7%
Inadequate training	52	26.7%
Lack of parental involvement	30	15.4%
Overcrowded classes	28	14.4%
Progress of "slower" and "faster" learners are hampered by OBA	27	13.8%

The participants identified an **administrative over-load** as one of the major challenges/problems they have encountered with the implementation of OBA. OBA requires a huge amount of paper work and record keeping and the participants feel that too much time is spent on the administration of OBA and that less time is available for teaching. Some of the specific issues related to this problem, mentioned by which participants are:

- Keeping a record book/file with particulars concerning the learners, assessment dates, descriptions of assessment activities, results of assessments and comments for the purposes of didactic support;
- Keeping an individual learner profile which is a continuous record containing learner information, information concerning the learner's progress, report cards and a summative record sheet of the achievement of learning outcomes; and
- The preparation of yearly work schedules and daily lesson plans.

Another major problem the participants identified was **inadequate training**.

The participants mentioned the following specific issues related to this problem:

- The duration of the training period was too short;
- The training was inappropriate and too theoretical by nature, with very little practical application; and
- No follow-up training or further support is provided by the department.

The participants identified the **lack of parental involvement** as a further obstacle in the implementation of OBA and raised the following issues in this regard:

- Parents do not understand OBE and OBA activities;
- Parents are not used to intervene in their children's work, as it was not expected of them in the past; and
- Parents are often illiterate and do not know how to intervene in their children's school work.

The participants identified **over-crowded classrooms** as yet another problem which makes the implementation of OBA very difficult (if not impossible) and raised the following specific issues in this regard:

- The large number of learners in classrooms and the lack of physical infrastructure and space cause disciplinary problems and make teaching and learning exceptionally difficult;
- It is very difficult to facilitate co-operative learning and peer-group assessments in over-crowded classrooms;
- It is very difficult to give formative feedback to groups and individual learners in over-crowded classrooms; and

- It is very difficult for the teacher to pay attention to individual learners and it becomes almost impossible to render corrective/remedial interventions, directed at learners with barriers to learning.

Lastly, participants were of opinion that **OBA hampers the progress of “slower” and “faster” learners**. The participants gave the following reasons for this opinion:

- The outstanding contributions made by “faster” learners are often not recognized or rewarded when group work is assessed;
- “Slower” learners may hinder the progress of “faster learners, especially during group work activities;
- Occasionally, due to the presence of ‘average” or “slower” learners in the group, “faster” learners do not experience group work assignments as challenging or rewarding enough;
- “Slower” learners occasionally do not contribute significantly towards the outcomes of a group work activity and “ride on the backs of the” faster” learners. Therefore, the group mark which is awarded to all the members of the group is not a reliable reflection of the abilities of “slower” learners; and
- Occasionally “slower” learners are disadvantaged by “faster” learners, because the “faster” learners become impatient or frustrated by the presence of the “slower” learners in the group and are not afforded the opportunity to make mistakes and to correct themselves. Because of this, valuable learning opportunities are wasted.

5.4 SUMMARY OF THE RESULTS

On the basis of the quantitative and qualitative results emanating from this survey, participants' most important perceptions of OBA are summarized below. For purposes of summarizing the quantitative results, only those items with a response rate of higher than 60% for Strongly Agree and Agree, Strongly Disagree and Disagree, and Yes/No responses were taken into consideration. As far as the qualitative results are concerned, the identified categories derived from the qualitative analysis are reported. Further more, participants' perceptions will be reported in terms of positive and negative perceptions of OBA and specific aspects pertaining to it.

5.4.1 Positive perceptions of OBA and specific aspects pertaining to it

- Participants perceive a school-based OBA policy as a valuable guideline for the successful implementation of OBA (see Table 5.1);
- OBA requires the commitment of all stakeholders in order to improve the quality of assessment (see Table 5.2);
- OBA provides the necessary focus for improvement in teaching and learning (see Table 5.2);
- Educators should use a variety of assessment types when implementing OBA (see Table 5.2);
- Educators understand the main purpose of continuous assessment (CASS). (see Table 5.2);
- Self-assessment helps learners to think critically about the quality of their own work and efforts (see Table 5.3);
- Peer-assessment is a more transparent method of assessment than educator assessment (see Table 5.4);
- Peer-assessment promotes co-operative learning (see Table 5.4);
- Learners perceive peer-assessment as a fair method of assessment (see Table 5.4); and

- Peer-assessment is more objective than self-assessment (see Table 5.4).

5.4.2 Negative perceptions of OBA and specific aspects pertaining to it

- OBA may de-motivate learners because codes are awarded to their efforts rather than marks, percentages or symbols (see Table 5.2);
- OBA can involve a huge amount of paper work and record keeping (see Tables 5.2 and 5.7);
- Self-assessment is not as reliable as educator assessment (see Table 5.3);
- Friendship may influence the reliability of peer assessment (see Table 5.4);
- Parents do not assist learners with OBA activities at home (see Tables 5.5 and 5.7);
- Parents are tired of assisting learners with their school work at home (see Table 5.5);
- Parents find it difficult to assist their children with their school work at home because they lack the knowledge to do so (see Table 5.5);
- Parents think that educators use parental participation and support as an excuse to neglect their teaching responsibilities (see Table 5.5);
- Participants are not comfortable with the implementation of OBA (See Table 5.6);
- Participants are of opinion that the previous system of tests and examinations worked better than OBA (see Table 5.6);
- Participants feel that they are inadequately trained and have a need for further training (see Tables 5.6 and 5.7);
- Participants are of opinion that over-crowded classrooms hamper the implementation of OBA (see Table 5.7); and
- Participants think that the progress of “slower” and “faster” learners is hampered by OBA (see Table 5.7).

5.5 DISCUSSION OF THE RESULTS

When the positive and negative perceptions of OBA are considered, it is clear that the participants do not experience a problem with the theoretical foundations and didactical principles on which OBA is based. The largest majority of the participants (79.5%) were in agreement that OBA provides the necessary focus for improvement in teaching and learning (see Table 5.2). Thus, it can be deduced that participants do not query the educational value of OBA, but that they experience problems with the implementation thereof. Because they do not know *what* to assess, *when* to assess and *how* to assess, 86.7% of the participants indicated that they feel uncomfortable with the implementation of OBA and that the traditional way of summative assessments (tests and examinations) worked better than OBA. The reason why 70.3% of the participants indicated a preference for the traditional ways of assessment must be ascribed to the fact that they were trained to assess this way and that they believe that the traditional ways of assessment are more reliable. Through the years they have developed their own unique assessment styles based on the principles and methods of traditional assessment and therefore feel comfortable with it.

The participants' feelings of insecurity with the implementation of OBA must be ascribed to factors such as inadequate training and the absence of continuous further training opportunities. This is the reason why 89.2% of the participants expressed the need for further training in OBA (see Table 5.6). Other factors such as the absence of departmental guidance and support, inadequate resources (teaching and learning materials) and infrastructure, over-crowded classrooms, administrative over-loads and lack of parental support and participation further complicate the implementation of OBA.

The negative perceptions regarding OBA and the implementation problems/challenges which were highlighted by this survey are not unique to the educators who participated in this survey or the South African teaching population. Research conducted by Brindley (2001:406) and Combrinck

(2003:62) amongst Australian and New Zealand educators revealed the following reasons why these educators felt incompetent and negative about OBE-assessment:

- educators' limited knowledge and experience of OBE-assessment;
- insufficient and inadequate opportunities for pre- and in-service training regarding OBE-assessment;
- the increased workload implied by OBE-assessment practices and the time-consuming nature thereof;
- inadequate or absent resources in terms of physical infrastructure, teaching and learning material, departmental guidance and know-how; and
- over-crowded classrooms and assessment problems related to multi-cultural and inclusive classrooms.

The striking similarity between the results emanating from this research and the findings of the above-mentioned Australian and New Zealand studies indicate that it cannot be expected of educators to feel positive about OBA and to implement it enthusiastically and successfully if they have not been adequately trained to do so. Furthermore it is impossible to implement OBA successfully if educators do not regularly receive further training in OBA, and if they lack continued departmental support and guidance. Other factors which determine the successful implementation of OBA are (1) the implementation of a realistic educator-learner ratio as recommended by the Department of Education, (2) the commitment and participation of all stakeholders (departmental officials, academics at universities and other teacher training institutions, educators, learners and parents) and (3) the provision of adequate physical infrastructure and other resources (e.g. teaching and learning material).

5.6 CONCLUSIONS

Based on the results emanating from this survey, the following conclusions are drawn:

- Educators endorse the theoretical foundations on which OBA is based and they are of opinion that OBA can provide the necessary focus for an improvement in teaching and learning, but they have negative perceptions about the practical implementation thereof;
- Educator's negative perceptions concerning the implementation of OBA must be ascribed to:
 - a lack of knowledge and skills due to inadequate training;
 - a lack of departmental support and guidance;
 - the administrative over-load brought on by OBA;
 - over-crowded classrooms and infrastructural deficiencies, and
 - a lack of parental support and involvement.

5.7 RECOMMENDATIONS

In the light of educators' negative perceptions concerning the practical implementation of OBA, the following recommendations are made:

5.7.1 Recommendations for the Department of Education

In order for schools and educators to implement OBA effectively, the Department of Education will need to implement the following recommendations:

- The content and nature of departmental OBA training programmes must be modified. Less emphasis should be placed on theoretical aspects related to OBA and more time should be devoted to the practical, hands-on classroom implementation thereof;

- Presenters of these programmes must have first-hand knowledge and experience of OBA and its implementation;
- The department must provide opportunities and facilities for continuous follow-up training and support;
- OBA help lines/desks should be established on regional and school district levels, so that educators can be assisted or supported whenever the need arises;
- More streamlined and user-friendly administrative procedures for record keeping and reporting must be developed;
- The recommended educator-learner ratios for primary and secondary schools must be enforced in order to eliminate over-crowding of classrooms; and
- The department must provide the basic infrastructure and resources (teaching and learning material) so that effective teaching and learning can take place.

5.7.2 Recommendations for universities and other teacher training institutions

- Curricula for pre-service teacher training programmes should be developed or modified so that prospective educators are professionally equipped in terms of the theoretical knowledge of OBA and practical skills of implementation;
- Universities and other teacher training institutions should collaborate with the different departments of education for purposes of the development and presentation of in-service programmes (short courses) on OBA; and
- Faculties/schools of education should continuously focus their research on OBA and its implementation and disseminate their findings and recommendations to departments of education, educator trade unions, schools and educators.

5.7.3 Recommendations for schools

- Schools must develop a school-based OBA-policy which can guide all aspects of assessment in the school;
- In conjunction with the OBA-policy, school assessment teams must be established so that continuous guidance and assistance can be given to educators who experience problems with the implementation of OBA;
- Schools should establish OBA networks with other schools, so that colleagues can share their knowledge, skills and teaching and learning materials with one another;
- Schools must encourage and support educators to attend OBA training programmes and to register for OBA courses being offered by universities or other institutions;
- Schools should invite parents to OBA information sessions so that parents can be informed about the assessment approach and process, and the supportive role parents can play; and
- Schools should, in conjunction with NGOs offer Adult Basic Literacy and other skills development programmes to school parents and other members of the community. In this way the problem of parental illiteracy and lack of involvement in school activities and learners' progress can be addressed.

5.7.4 Recommendations for teachers

- Teachers must establish their own OBA teacher networks for the purposes of collegial advice and assistance and the sharing of information and resources;
- Teachers must attend in-service OBA training opportunities and register for OBA courses offered by universities or other institutions;
- Teachers must lobby and put pressure on teacher unions to provide opportunities for further professional development in the field of OBA; and

- Teachers must liaise with parents on a regular basis to keep them informed about the assessment process, and their children's progress.

5.7.5 Recommendation for further research

This research was conducted in the Bojanala West Region of the North West Province. The study population included educators who taught in schools of all four educational Area Project Offices (APOs) in this region. Thus the findings of the research can neither be generalized to other regions of the province, nor to the entire population of South African educators. Therefore it is recommended, that the study should be replicated on a national sample of educators.

5.8 CONCLUDING REMARKS

Assessment can never be separated from the teaching and learning process. It forms an integral part of the teaching and learning situation and should not be regarded as a separate didactic activity. It should be accepted as a daily activity which teachers do, or are supposed to do, in order to determine whether effective teaching and learning have occurred and to plan future teaching and learning successes.

This study has revealed that educators have negative perceptions regarding the implementation of OBA. Although the findings apply to a particular study population of educators, one can assume that assessment has become a problematic and controversial matter in a substantial number of other South African schools as well. Should this assumption be proven to be correct, it will have serious implications for effective teaching and learning, and should the situation continue, it will become a major obstacle in the attainment of the critical and developmental outcomes the education authorities have set for education in South Africa.

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APPENDIX A

QUESTIONNAIRE ON OUTCOMES-BASED ASSESSMENT (OBA)

SECTION A: BIOGRAPHICAL DATA

Kindly respond to the questions below by making a cross (x) in the relevant box next to each item.

1. AGE

30 and below	1
31 – 35	2
36 – 40	3
41 – 45	4
46 – 50	5
51 and above	6

(1)

2. GENDER

Female	1
Male	2

(2)

3. TEACHING EXPERIENCE

5 yrs and below	1
6 – 10 yrs	2
11 – 15 yrs	3
16 – 20 yrs	4
21 yrs and above	5

(3)

4. SETTLEMENT TYPE OF THE SCHOOL

Rural	1
Urban	2

(4)

5. TYPE OF SCHOOL

Primary	1
Secondary	2

(5)

6. QUALIFICATIONS

Matric plus professional teaching qualification	1
Bachelor's degree plus professional teaching qualification	2
B.A.Ed / B.Sc Ed	3
Honour's degree	4
Master's degree	5
Others (Specify).....	6

(6)

SECTION B: PERCEPTIONS OF OUTCOMES BASED ASSESSMENT (OBA)

Kindly read each statement carefully and make a cross (x) in the box that best represents your perception.

The following key must be used when answering the items:

4: Strongly Agree (SA)

3: Agree (A)

2: Disagree (D)

1: Strongly Disagree (SD)

B1: OUTCOMES-BASED ASSESSMENT (OBA) POLICY	SA	A	D	SD
1. Schools must draw up an OBA policy	4	3	2	1
2. The OBA policy should be drawn up by all the relevant stakeholders in the school	4	3	2	1
3. The OBA policy assists educators to cope with the challenges brought about by OBA	4	3	2	1

B2: OUTCOMES- BASED ASSESSMENT	SA	A	D	SD
1. OBA can be time consuming	4	3	2	1
2. OBA can hamper the rate of progress of faster learners	4	3	2	1
3. OBA may de-motivate learners because codes (beyond achieved, achieved, partially achieved, not achieved) are awarded to their efforts, rather than marks, percentages, or symbols	4	3	2	1
4. OBA can involve a lot of paper work and record keeping	4	3	2	1
5. OBA requires the commitment of all stakeholders in order to improve the quality of assessment	4	3	2	1
6. OBA provides the necessary focus for improvement in teaching and learning	4	3	2	1
7. OBA may lead to a situation where educators assess learners just for the sake of assessment	4	3	2	1
8. Educators should use a variety of assessment types when implementing OBA	4	3	2	1
9. Educators understand the main purposes of continuous assessment (CASS)	4	3	2	1

B3: LEARNER SELF ASSESSMENT	SA	A	D	SD
1. Self-assessment helps learners to think critically about the quality of their own work.	4	3	2	1
2. Self-assessment is not so reliable as educator assessment	4	3	2	1
3. Learners regard self-assessment as a waste of time	4	3	2	1
4. Learners feel that educators use self-assessment as an excuse to neglect their own assessment responsibilities	4	3	2	1

<p>2. Are you comfortable with the implementation of OBA?</p> <p>Why?.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>YES</p>	<p>NO</p>
<p>3. The previous system of tests and exams worked better than OBA</p> <p>Why do you think so ?</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>YES</p>	<p>NO</p>

4. On the basis of your teaching experience what specific problems or challenges have you encountered with regard to the implementation Outcomes-Based Assessment (OBA)?

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THANK YOU FOR YOUR CO-OPERATION