

AN INVESTIGATION INTO THE ATTITUDES, PERCEPTIONS AND  
FACTORS AFFECTING THE IMPLEMENTATION OF THE  
CONSUMER STUDIES TEACHING PORTFOLIO IN THE  
WESTERN CAPE EDUCATION DEPARTMENT

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## **ABSTRACT**

Assessment is a critical element for achieving the desired outcomes in outcomes-based education (OBE). In the subject area of Consumer Studies each teacher is required to compile a teaching portfolio about the assessment and classroom activities conducted in a given year. However, there is a paucity of research in the field of portfolio development for teaching Consumer Studies in the secondary school.

The main objective of this study was to investigate the attitudes, perceptions and factors affecting the implementation of the Consumer Studies teaching portfolio in the Educational Management Developmental Centres (EMDCs) of the Western Cape Education Department (WCED). The sub-objectives were firstly to assess the teachers' attitudes toward the Consumer Studies teaching portfolio as an assessment tool. A second aim was to describe teachers' perceptions of assessment methods in the Consumer Studies teaching portfolio, while a third was to identify the factors that affect the development of the said portfolio.

A structured questionnaire was used to determine the attitudes, perceptions and factors affecting the implementation of the Consumer Studies teaching portfolio. The questionnaire contained three sections, the first of which related to the participants' demographic information. The second section comprised three parts. The first dealt with factors that influenced the choice of the assessment method used in Consumer Studies. The second part focused on the participants' attitudes toward the assessment process, and the third on teachers' perceptions of constraints or barriers that impact on the assessment process. Section three centred around factors that relate to the process of compiling the teaching portfolio, such as skills required for this purpose, activities that need to be reconsidered in the course of compiling the portfolio, and the benefits of the teaching portfolio as such.

The SAS statistical package was used for an analysis of the data in this study. Therefore various statistical methods were applied. The independent variables were illustrated by using frequency tables. The non-parametric Friedman's test was used for analysis, because the data was not on an interval scale, and was therefore ranked. The pairwise comparison test was used to determine the association between factors

for each assessment method used in the Consumer Studies teaching portfolio. Results were achieved by applying these methods of data analysis.

With regard to demographics, the mean age of the teachers in the study were female and 40, holding a Higher Diploma in the Education of Home Economics /Needlework. The results of the factors influencing the selection of an assessment method showed that no single factor could be linked to a particular assessment method. There are several factors that influence the selection of one specific assessment method. Choosing the learner portfolio as an assessment method is influenced by various factors such as planning for instruction, diagnosing student weaknesses, monitoring student progress, communicating student achievement, motivating students and assigning grades. These factors are selected among the assessment methods for observation-based, test-based and task-based assessment. The teachers displayed a positive attitude toward the assessment process, because they rated the assessment process as valuable, successful, efficient, important, good, fair, reputable, flexible and relaxed. There was a large percentage of teachers who felt that the assessment process was tense instead of relaxed. The teachers did not perceive any of the constraints or barriers as having a negative impact on the assessment process. The factors relating to the teaching portfolio included all the skills, activities and benefits required for compiling a teaching portfolio. Those demanding particular attention are self-reflection, journal writing, writing a teaching philosophy and self-evaluation.

Recommendations offered in this study are that training programmes be run for pre-service and in-service teachers so that teachers can feel more confident when compiling a teaching portfolio. The National Department of Education should provide structure and assessment criteria to guide teachers in the development of a teaching portfolio. Published material about teaching portfolios should be made available to teachers.

The teaching portfolio is a valuable assessment tool that can be used not only in the development of the teacher's teaching strategy, but also for determining a teacher's strengths and weaknesses in his or her professional career.

## OPSOMMING

Assessering is 'n kritiese element om te verseker dat die verlangde leeruitkomst in uitkomsgebaseerde onderrig bereik word. In die vakgebied Verbruikerstudie word van elke onderwyser verwag om 'n onderwysportefeulje saam te stel oor die assessering en klaskameraktiwiteite wat in 'n betrokke jaar plaasvind. Daar bestaan egter 'n gebrek aan navorsing in die veld van portefeulje-ontwikkeling vir die onderrig van Verbruikerstudie in die sekondêre of hoërskool.

Die hoofdoelwit van die studie was om houdings, persepsies en faktore te ondersoek wat die implementering van onderrigportefeuljes beïnvloed by Ontwikkelingsentrums vir Onderrigbestuur binne die Wes-Kaapse Onderwysdepartement. Die subdoelwitte was eerstens om onderwysers se houdings teenoor die opvoedingportefeulje as 'n assesseringsinstrument te evalueer. Tweedens het die studie hom ten doel gestel om die Verbruikerstudie-onderwysers se persepsies van evalueringmetodes in die opvoedingportefeulje te beskryf. 'n Derde subdoelwit was om faktore te identifiseer wat die ontwikkeling van die onderrigportefeulje vir Verbruikerstudie beïnvloed. Met behulp van 'n vraelys is die verlangde resultate bereik.

Deur die gebruik van 'n gestruktureerde vraelys is vasgestel watter houdings, persepsies en faktore die implementering van die onderrigportefeulje vir Verbruikerstudie beïnvloed. Die vraelys het drie afdelings beslaan. Die eerste afdeling het die demografiese inligting van die deelnemers bevat. In die tweede afdeling, wat uit drie dele bestaan het, was die eerste deel gerig op faktore wat die keuse van 'n evalueringmetode vir Verbruikerstudie beïnvloed. Die tweede deel het gefokus op onderwysers se houdings teenoor die evalueringproses, en die derde op onderwysers se persepsies van die beperkings of hindernisse wat die evalueringproses beïnvloed. Die derde afdeling het die faktore gedek wat verband hou met die opvoedingportefeulje as sodanig. Dit het faktore ingesluit soos die vaardighede wat nodig word om 'n onderrigportefeulje saam te stel, die aktiwiteite wat hersien moet word vir die saamstel van 'n onderrigportefeulje, en die voordele van die betrokke portefeulje.

Die data in die studie is met behulp van die SAS statistiek-pakket ontleed, en daarom is verskillende statistiese metodes toegepas. Die selfstandige variant is deur frekwensietabelle geïllustreer. Die data is deur Friedman se nie-parametriese toetse ontleed, want die studie het nie oor interval-data beskik nie en data is dus georden. Die gepaarde vergelykingstoets het die verbintenis tussen die faktore vir elke evalueringmetode in die Verbruikerstudie-onderrigportefeulje bepaal.

Ten opsigte van die deelnemers se demografiese gegewens, die meerderheid was van die vroulike geslag en 40 jaar, en in besit van 'n Hoër Onderwysdiploma in Huishoudkunde/Naaldwerk. Die resultate met betrekking tot faktore wat die keuring van 'n evalueringmetode beïnvloed, het uitgewys dat daar nie slegs een enkele metode is wat vir evaluering toegepas word nie. Daar is verskeie faktore wat die keuse van 'n bepaalde evalueringmetode beïnvloed. Die faktore wat die leerderportefeulje beïnvloed is lesbeplanning, die diagnosering van leerders se swakhede, die monitering van leerders se vordering, die wyse waarop leerderprestasie meegedeel word, die motivering van leerders en die toekenning van punte. Hierdie faktore word ook gebruik vir evalueringmetodes wat gebaseer is op waarneming, toetsing en take. Die onderwysers het 'n positiewe houding getoon teenoor die evalueringproses, omdat hulle dit beoordeel het as waardevol, suksesvol, doeltreffend, belangrik, goed, regverdig, betroubaar, buigsaam en ontspanne. Alhoewel 'n groot persentasie onderwysers die evalueringproses as spanningsvol ervaar het, het hulle nie die persepsie gehad dat die beperkings of hindernisse 'n negatiewe impak op die evalueringproses uitgeoefen het nie. Belangrike faktore in verband met die onderrigportefeulje het al die bekwaamhede, aktiwiteite en voordele ingesluit wat 'n rol speel wanneer so 'n portefeulje saamgestel word. Faktore wat aandag vereis, is self-refleksie, die skryf van 'n joernaal om 'n onderwysfilosofie daar te stel, en self-evaluering.

Die aanbevelings van hierdie studie is dat daar meer opleidingsprogramme moet wees vir die voor- en in-diensopleiding van onderwysers sodat hulle meer selfvertroue kan hê wanneer 'n onderrigportefeulje saamgestel word. Die Nasionale Departement van Opvoeding behoort meer struktuur en evalueringkriteria te verskaf wat dien as 'n gids

vir die samestelling van onderrigportefeuljes. Voorsiening moet gemaak word vir boekpublikasies oor onderrigportefeuljes vir onderwyers.

Die onderrigportefeulje is 'n waardevolle bron wat nie net gebruik kan word vir die ontwikkeling van 'n onderwyser se onderwysstrategie nie, maar ook van groot nut is vir die bepaling van onderwysers se sterk en swak punte in hulle professionele loopbaan.

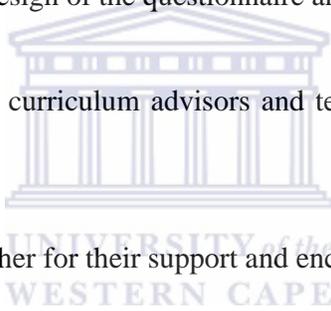


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- To my parents and brother for their support and encouragement.
- To God, my source of strength.



## DECLARATION

I, the undersigned hereby declare that the work contained in this thesis is my own original work and that I have not previously in its entirety or in part submitted it at any university for a degree.

Liezl Cornelissen

November 2008

Signed: \_\_\_\_\_



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**KEYWORDS**

Assessment

Assessment methods

Attitudes

Consumer Studies

Learner

Outcomes-based education

Perceptions

Teacher

Teaching portfolio



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## LIST OF ABBREVIATIONS AND ACRONYMS

ABET	Adult Basic Education and Training
ANC	African National Congress
CASS	Continuous assessment
CORP	Collection, organisation, reflection and presentation of evidence
C2005	Curriculum 2005
DoE	Department of Education
EMDC	Education Management Development Centre
FET	Further Education and Training
FETC	Further Education and Training Certificate
GETC	General Education and Training Certificate
Grade R	Reception year
HET	Higher Education and Training
INTASC	Interstate New Teacher Assessment and Support Consortium
MEC	Member of Executive Council
NBPTS	National Board for Professional Teacher Assessment and Support
NCS	National Curriculum Statement
NGO	Non-governmental organisation
NQF	National Qualifications Framework
NSB	National Standard Bodies
OBE	Outcomes-based education
RNCS	Revised National Curriculum Statement
SAQA	South African Qualifications Authority
SAS	Software package for statistical analysis of data
SETA	Service and Education Training Authority
SMME	Small, medium and micro-enterprise
WCED	Western Cape Education Department

# CHAPTER ONE

## STATEMENT OF THE PROBLEM

### 1.1 INTRODUCTION

Assessment is a critical element of outcomes-based education (OBE) in the National Curriculum Statement (NCS) Grades 10-12 (General) (Van der Horst & McDonald, 2003: 166; Department of Education, 2003a: 37). Without valid and fair assessment procedures and practices it will not be known if the learning outcomes of a specific programme, unit or lesson have been achieved for both learners and teachers (Van der Horst & McDonald, 2003: 166). Assessment is not a process the teacher thinks about at the end of a programme or unit or lesson; it is an integral part of all planning, preparation and implementation (Van der Horst & McDonald, 2003: 166).

It is important that the assessment procedures are transparent to learners so that they are clear about what they are learning. These assessment procedures should be flexible and unbiased, and designed in a way that it measures the outcomes that are to be achieved by the learners (Van der Horst & McDonald, 2003: 166).

When a teacher assesses a learner, it is crucial that the purposes of the assessment be clearly and unambiguously established (Department of Education, 2003a: 37). Understanding the purpose of assessment ensures that an appropriate match exists between the purpose and methods of assessment (Department of Education, 2003a: 37). This in turn, will assist to ensure that decisions and conclusions based on the assessment are fair and appropriate for the particular purpose. A method used to record the process of assessment is the development of a teaching portfolio. A teaching portfolio is a tool of teacher evidence that contains various methods of assessment by means of which learners' achievements are evaluated according to the purpose of the programme, unit or lesson.

Kimeldorf (2004: 4) states that teachers need to produce a teaching portfolio before they can truly guide learners in their tasks. Hebert (2001: 48) states, "One

now knows that there is no single, correct portfolio, one has come to understand that the determination of purpose, ownership and selection of the content of the portfolio is an evolving process shared by learner and teacher.”

This study investigated the teachers' attitudes towards and perspectives on the development of a teaching portfolio for Consumer Studies. The Western Cape Education Department (WCED) required this document for curriculum advisors to evaluate teachers' assessment decisions.

## **1.2 RATIONALE FOR THE STUDY**

The concept of the development of the teaching portfolio was introduced in Curriculum 2005 (C2005). The researcher attended training sessions for Consumer Studies teachers that were run by the WCED. Through conversations and observations the researcher noticed that the attending teachers did not seem to have a positive attitude towards the development of a teaching portfolio. It was regarded as a tedious task, because every assignment issued by the teacher to the learner had to be filed in the teaching portfolio.

While searching for research material about the teaching portfolio, the researcher realised that there was a dearth of South African research about the teaching portfolio, and that South African literature on this matter was insufficient. This could be due to the fact that the teaching portfolio was a relatively new tool for the assessment of teachers in South Africa. The study under consideration would therefore serve to contribute to research in this field. There is a need for guidelines to provide teachers in the WCED with knowledge about compiling and implementing a teaching portfolio. This should facilitate the process and make teachers aware of the benefits of a teaching portfolio. Another cause for concern relating to the concept of the teaching portfolio relates to its assessment. It is unclear how the teaching portfolio is used to assess teachers in the workplace. If clear guidelines were given, teachers would be enthusiastic about compiling and implementing the teaching portfolio. At present it is seen as a threat rather than an assessment tool which could improve teaching strategies in terms of learning

content, teaching methods, learner activities and media (Jacobs in Jacobs, Vakalisa and Gawe, 2004: 71).

Briede (2005: 2) indicates that the aim of the teaching portfolio is to collect evidence that displays evidence of a teacher's competencies, professional development and career advancement. Therefore a teaching portfolio is a visual representation of the teacher, and the content of the teaching portfolio must be an independent process undertaken by each teacher (Hurst, Wilson & Cramer, 1998: 1). The teaching portfolio can also be used to support an environment of reflection and collaboration with colleagues, mentors and learners (Rodriguez-Farrar, 2006: 4). Through the reflective process teachers can identify areas of their instruction that need improvement. Teaching portfolios allow teachers to use a variety of teaching strategies to display their level of competence. In the South African context, this is the aim of the teaching portfolio.

Painter (2001: 31) describes the teaching portfolio as a “documented history of a teacher's learning process as set against a set of teaching standards”. The portfolio is much more than a collection of written artefacts: it is a complete collection of material that is evident of a teacher's teaching practice as related to learner learning (Mues and Sorcinelli, 2000: 1). Besides being used to describe teaching strengths and accomplishments, developing the portfolio also stimulates self-improvement (Seldin, 2000: 39).

### **1.3 SIGNIFICANCE OF THE RESEARCH**

The purpose of a teaching portfolio can be seen as a reflective tool for teachers. The South African OBE system and the NCS enable learners to develop holistically in terms of knowledge, skills, values and attitudes for entrance into Higher Education institutions or the job market. This holistic development is not only relevant in terms of subject matter, but also refers to the personal development of the learner. Through the teaching portfolio the teacher is able to regularly assess the learning activities to ensure that the holistic development of the learner is indeed taking place.

The results of a study of this nature can be used to improve the attitude and perceptions of teachers towards the teaching portfolio. Consequently the portfolio can become a reflective tool to assist teachers in their professional and personal development. Therefore the purpose of this study was to determine the attitudes, perceptions and factors affecting the implementation of the Consumer Studies teaching portfolio in the WCED.

## **1.4 OBJECTIVE OF THE STUDY**

This section presents the main objectives and sub-objectives of the research.

### **1.4.1 Main objective**

The main objective was to investigate the attitudes, perceptions and factors affecting the implementation of the Consumer Studies teaching portfolio in the nine Education Management Development Centres (EMDCs) of the WCED.

### **1.4.2 Sub-objectives**

1. To determine the factors that influence the selection of an assessment method for the Consumer Studies teaching portfolio.
2. To determine the teachers' attitudes toward the assessment process when developing a Consumer Studies teaching portfolio.
3. To describe teachers' perceptions of the constraints of the assessment process.
4. To identify the factors that affect the development of the Consumer Studies teaching portfolio.

## **1.5 CONCEPTUAL AND THEORETICAL FRAMEWORK**

The research is located within the field of Consumer Studies. Research of this nature has not yet been attempted in South Africa. Salient for the understanding of dynamics of this process is that it has key parts and is developmental in nature. Theoretically the study will be approached as follows:

- An educational perspective that looks at the change and transformation of the South African education system from 1994 up to the present.

- A psychological perspective that focuses on the attitudes, perceptions and motivating factors of Consumer Studies teachers with regard to the teaching portfolio.
- An assessment perspective that looks at the various assessment methods used in the Consumer Studies teaching portfolio.



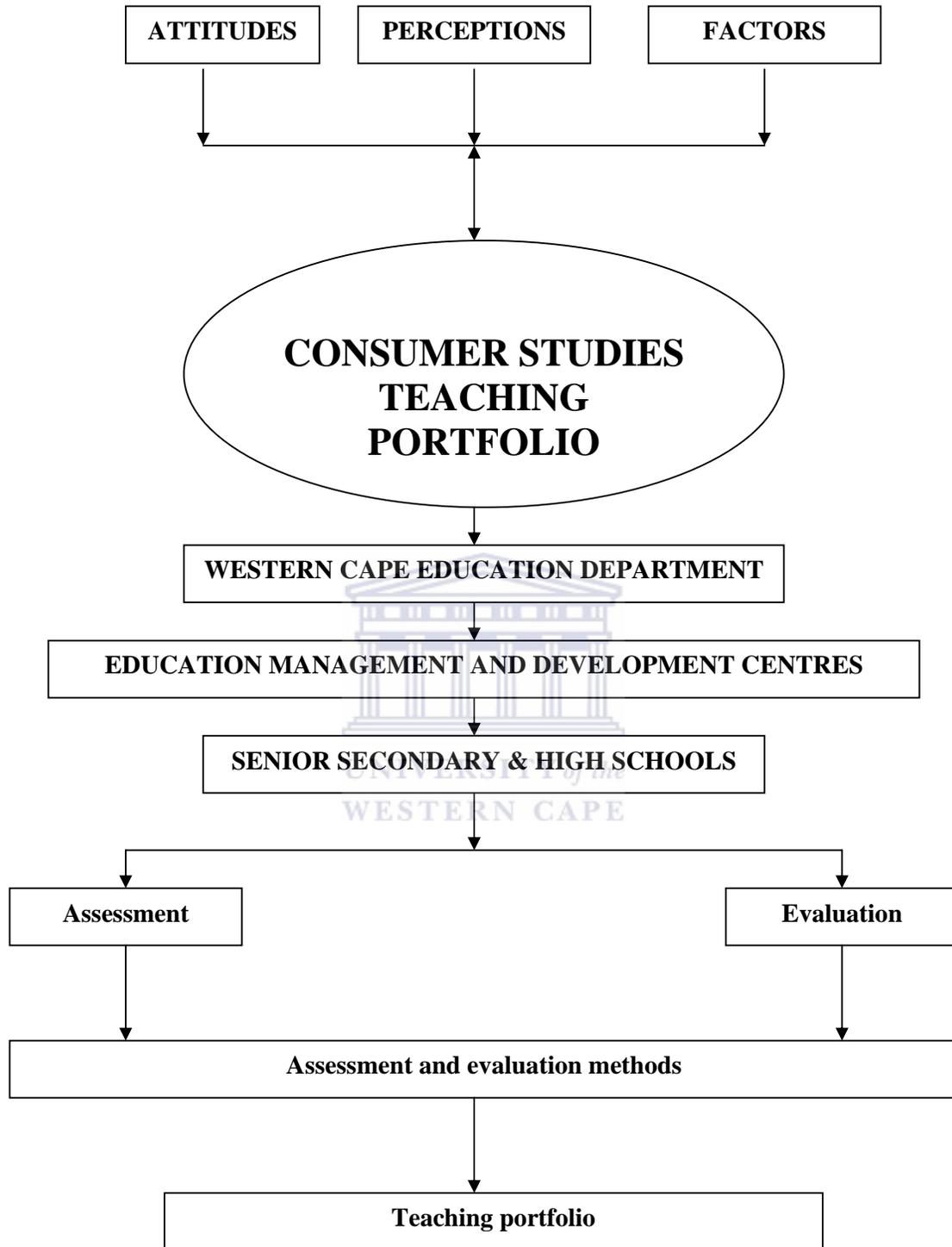


Figure 1.1: Conceptual framework of research

## 1.6 DELIMITATIONS OF THE STUDY

- The research took place in the EMDCs of the WCED and therefore cannot be generalised for the other provinces in South Africa.
- The research was conducted in the subject area Consumer Studies only.
- The assessment methods that were researched were those used only in the Consumer Studies curriculum.

## 1.7 OPERATIONAL DEFINITIONS

- **Assessment** is defined as the process of identifying and interpreting information about a learner's achievement in order to assist the learner's development and improve the process of learning and teaching (Bitzer, 2000).
- **Assessment methods** are activities that the teacher uses to obtain evidence about a learner's competence (Van Rooyen, 2003: 42).
- **Attitude** is a settled way of thinking or feeling (Dictionary Unit for South African English, 2002: 69).
- **Consumer Studies as a subject** focuses on developing knowledge, skills and attitudes, enabling learners to become responsible and informed consumers of food, clothing, housing, furnishings and household equipment and to use resources optimally and in a sustainable manner. The subject also promotes the application of knowledge and skills in the production of quality marketable products that will meet consumer needs (Department of Education, 2003a: 9).
- **Evaluation** is the process whereby the information obtained through assessment is interpreted to make judgements about a learner's level of competence (Bitzer, 2000).

- **Learner** refers to any person, including part-time learners, obtaining an education at a public or independent school or learning institution linked to an accredited assessment body (Department of Education, 2005a: 20).
- **Perception** is a way of regarding, understanding or interpreting something or intuitive understanding and insight (Dictionary Unit for South African English, 2002: 864).
- **Teacher** is a person who teaches in a school (Dictionary Unit for South African English, 2002: 1202).
- **Teaching portfolio** is a compilation and recording of all the tasks for school-based assessment that includes a collection of all the assessment tasks, the annual programme of assessment, learning programmes and subject record sheets (Department of Education, 2005b: 17).

## 1.8 ETHICAL STATEMENT

According to Terre Blanche & Durrheim (1999: 65) the essential purpose of ethical research planning is to protect the welfare and the rights of research participants. Therefore, for the duration of this study, the ethics of accommodating the participants will be considered. Informed consent was granted by the WCED to obtain permission for conducting the study at the EMDCs, and by the educators for their participation in the study. Participants were also given a full and clear explanation of the research that would be taking place.

In addition to participants giving their permission, they would be protected from being identified, since names were to be omitted in all research instruments. From the onset of the study, participants were assured of confidentiality. Participation was voluntary and participants could withdraw from the study at any stage. Permission was obtained from participants to disclose information, should any publication result from this study. On completion of the research project the researcher would provide feedback to the WCED and participants in the study.

# CHAPTER TWO

## LITERATURE REVIEW

The purpose of this chapter is to present a literature review of selected concepts of outcomes-based education, assessment, Consumer Studies and the teaching portfolio as an assessment tool.

### 2.1 INTRODUCTION

All over the world people want to be equipped with knowledge, skills and values that would help them develop into active and valuable citizens, creating a prosperous country with a future for all. The knowledge base, skills and values of many adult South Africans were formed and shaped in the Apartheid era and as a result of this, learners were not taught to appreciate and accept the aspirations and perspectives of people from different racial and cultural backgrounds (Van der Horst & McDonald, 2003: 3).

Prior to 1994, Black South Africans were not deemed active and valuable citizens in the country, due to the inequalities in the South African education system. The entire education system was organised along racial lines. This led to marked inequalities in educational standards. The curriculum was geared to the needs of minorities in many ways: there was lack of uniformity and adaptability, insufficient individualisation, excessive accentuation of factual knowledge and memorisation, dropping out and exaggerated competition between learners. In addition, the curriculum was too academic by nature, skills education remained behind, and a large disparity existed between education in the formal education sectors and training offered by employers. The curriculum was content-based, which meant that the teacher instructed and learners memorised the knowledge. As such, the traditional education system was teacher-centred and learner achievement was measured in terms of symbols and percentages that are often no real indication of actual performance (Pretorius, 1998: viii–ix).

Furthermore, the historically “white” education was well-resourced and black schools were under-resourced. The lack of resources impacted negatively on the quality of teaching and learning in South African schools (Department of Education, 2003b: 1).

Following the 1994 democratic elections, a non-racial education system based on the principles of equity was instituted, providing for central as well as provincial and local organisation of education, thereby eliminating some of the duplication of the past (Van Wyk & Mothata in Pretorius, 1998: 1). The aim of the revised education system was to provide redress, equity, access and quality education. The Post-Apartheid South African education system promoted adequate education and training opportunities that did not exist in the Apartheid era. All South African citizens were granted the opportunity to develop their full potential by means of formal or non-formal education. The new education system is people-centred and success-centred (Van der Horst & McDonald, 2003: 4). To this end, a new legislative framework for education and training was developed when the South African education system was reformed.

## **2.2 THE SOUTH AFRICAN EDUCATION SYSTEM: PRE-1994**

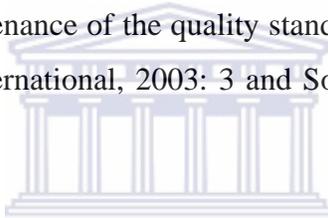
The current Department of Education (DoE) inherited a cumbersome education system accommodating 124 subjects. In the Apartheid era, all school subjects were divided into Higher, Standard and Lower grades. This division of grades increased the number of subjects to 264. Of the 124 subjects, only ten subjects were studied by 90% of the candidates at any single sitting of the Senior Certificate (Department of Education, 2003b: 1).

The traditional understanding of the teaching and learning process in the Apartheid era was that each subject contained a certain amount of content that the learner should know. The content of a subject was divided up according to what and how much was to be learnt in a particular grade. Learners were required to memorise each portion of knowledge that had been set for a particular grade. Therefore a learner's capacity to memorise and recall facts were mostly developed and assessed in this traditional education system. (Le Grange & Reddy, 1998: 4). The memorising and recalling of facts

were achieved through the examination system, according to which learners who did not pass the exam were labelled as “failures” (Van der Horst & McDonald, 2003: 28).

This situation needed educational reform that would bring about equity. The South African education system was eventually transformed to ensure that all South African citizens received an education of exceptional quality.

This led to the development of a new legislative framework for education and training that started with the South African Qualifications Authority (SAQA). Its primary aim was to structure the education and training sector to be aligned with the global economy (Olivier, 1998: 1). To achieve this quality, SAQA, a legislative body was established by the South African Qualifications Authority Act No. 58 of 1995, whose primary function included the control and maintenance of the quality standards and providers of education and training. (Competency International, 2003: 3 and South African Qualifications Act, No. 58 of 1995: 5).



### **2.3 THE SOUTH AFRICAN EDUCATION SYSTEM: POST-1994**

SAQA also sets the standards of educational outcomes in South Africa. SAQA is responsible for the development of level descriptors or critical cross-field outcomes that provide a brief description of the expected levels of competence required by learners for the eight levels on the National Qualification Framework (NQF) and the sub-levels of the General Education and Training band (GET) that includes the Adult Basic Education and Training (ABET) and the school phase levels. National Standard Bodies (NSB), also established by SAQA, oversees the setting of standards in various fields of learning. The SAQA board is representative of the country's major stakeholders in education and training (Van der Horst & McDonald, 1997: 74).

One of SAQA's tasks is to oversee the development and implementation of the NQF (Mothata in Pretorius, 1998: 14 and South African Qualifications Act, No. 58 of 1995: 5). Van der Horst & McDonald (1997: 74) and Mothata in Pretorius (1998: 18) indicate that the aim of the NQF is to reconstruct the education system of post-1994 into a system that

reflects an integrated approach to effectively address learners' needs and aims to improve the quality of education in South Africa. With the inception of SAQA, the NQF had been established to provide a registration procedure for national standards and qualifications (Act No. 58 of 1995: 5). The NQF was created to link education to the world of training and work, previously seen as two separate entities before the NQF was established. Adults who study or train outside an educational institution (e.g. night school, short courses or in-service training) can be awarded a certificate. The recognition of learning in the workplace could encourage employees to enrol for training courses or further studies and ensure equal opportunities to compete in the job market (Jacobs *et al.*, 2004: 55). This means that an employee's levels of knowledge, skill and disposition are recognised. The NQF connects the areas of learning in the workplace, allowing employees to move from one learning situation to another. The knowledge, skill and attitudes obtained in the previous learning situation can serve as a foundation for further learning. This means that qualifications and credits are easily transferable from one learning situation to another. The NQF meets the needs of the individual learner and the country (Van der Horst & McDonald, 2003: 70). The NQF provides opportunities for people who enter the learning environment to achieve a nationally and internationally comparable qualification (Olivier, 1998: 1).

The NQF provides learning opportunities for all learners, regardless of prior levels of education and training, age, particular circumstances, gender, religious orientation or race. The NQF forms the heart of lifelong learning (Van der Horst & McDonald, 2003: 70). Jacobs in Jacobs *et al.* (2004: 55) states that the NQF was produced as a national structure to underpin or support OBE. The NQF and OBE complement each other: the NQF ensures that employers recognise skills acquired outside the formal education system nationally and internationally, while OBE encourages formal institutions (e.g. universities) to align their programmes with workplace requirements (Jacobs in Jacobs *et al.*, 2004: 55).

The NQF is divided into three bands that illustrate the two routes, formal and informal education and training sectors of the South African education system. Within these three

bands eight qualification levels are located. See Table 2.1 (Mothata in Pretorius, 1998: 21).

The first band is the GET band where learners start their school career at reception year (Grade R), which is to be completed in Grade 9. This band is made up of three phases, namely the Foundation phase, Intermediate phase and the Senior phase (Mothata in Pretorius, 1998: 21). Parallel to this is Adult Basic Education and Training (ABET) levels 1–4.

The first phase is the foundation phase, which includes the reception year (Grade R), Grade 1, 2 and 3. The overall goal of this phase is focused on the learning areas of Literacy, Numeracy and Lifeskills with the opportunity to develop to their full potential as active, responsible and fulfilled citizens (Mothata in Pretorius, 1998: 21).

The second phase is the intermediate phase, which includes Grades 4, 5 and 6. Learners will begin to understand relationships between events, people and materials. Peer acceptance is extremely important in this phase and therefore group work and project work are essential. The learning areas covered in this phase are Languages, Literacy and Communication; Numeracy and Mathematics; Natural Sciences; Technology; Human and Social Sciences; Economic and Management Sciences; Arts and Culture and Life Orientation (Mothata in Pretorius, 1998: 21).

The third phase is the senior phase, where learners obtain the exit level that includes Grades 7, 8 and 9. This means that the learners obtain a GET Certificate. As this is the end of compulsory schooling (Mothata in Pretorius, 1998: 21), it is important that learners are well prepared for life after school. All eight learning areas are covered in these grades.

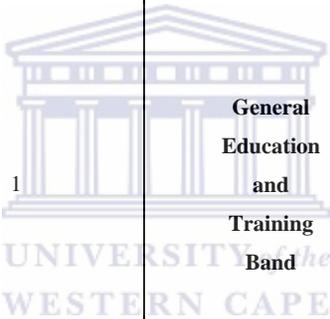
The second band of the NQF is the Further Education and Training (FET) Band, which includes Grade 10-12. This FET certificate may be obtained through various service providers such senior secondary schools and technical colleges; non-governmental

organisations (NGOs), private providers, FET colleges, industry training centres and companies. Learners who have achieved the outcomes for this second band will receive the FET certificate and can further their education at a college, technikon or university for a certificate, diploma undergraduate and postgraduate degree. At this level learners are prepared for higher education, vocational education careers and self-employment (Mothata in Pretorius, 1998: 22).

The third band is the Higher Education and Training (HET) Band that includes degrees, diplomas and certificates offered by colleges, technikons and universities (Van der Horst & McDonald, 2003: 71). This band is divided into four levels: level 5-7 includes certificates, diplomas and degrees and level 8 includes doctoral degrees and further research degrees such as postdoctoral studies (Van der Horst & McDonald, 2003: 69).



**Table 2.1: The National Qualifications Framework (NQF)**

School Grades	NQF Level	Band	Types of qualifications and certificates	
	8	<b>Higher Education and Training Band</b>	Doctorates, further research degrees	
	7		Degrees, diplomas and certificates	
	6			
	5			
<b>FURTHER EDUCATION AND TRAINING CERTIFICATES</b>				
12	4	<b>Further Education and Training Band</b>	School/College/NGOs Training certificates, Mix of units	
11	3		School/College/NGOs Training certificates, Mix of units	
10	2		School/College/NGOs Training certificates, Mix of units	
<b>GENERAL EDUCATION AND TRAINING CERTIFICATES</b>				
9		<b>General Education and Training Band</b>	Senior phase <b>Grades 7-9</b>	ABET 4
8			Intermediate phase <b>Grades 4-6</b>	ABET 3
7				
6			Foundation phase <b>Grades 1-3</b>	ABET 2
5				
4				
3			Preschool <b>Reception year</b>	ABET 1
2				
1				
R				

(Department of Education, 1997: 16 in Van der Horst & McDonald, 2003: 69).

For organisational purposes, the NQF divides all education and training into twelve organising fields that include:

1. Agriculture and Nature Conservation;
2. Arts and Culture;
3. Business, Commerce and Management Studies;
4. Communication Studies and Languages;
5. Education, Training and Development;
6. Manufacturing, Engineering and Technology;
7. Human and Social Studies;
8. Law, Military Science and Security;

9. Health Sciences and Social Services;
10. Physical, Mathematical, Computer and Life Sciences;
11. Services;
12. Physical Planning and Construction

(SAQA Act. No. 58 of 1995: 6).

When South Africa was democratised in 1994, its education system went through a transformation from a top-down approach to a linear approach where the learner's knowledge, skills and values were considered at a national level down to provincial level and local level. This educational transformation had to be aligned with the democratic political system of South Africa and had to make provision for all South African learners, irrespective of race, cultural or socio-economic status. Thus OBE was implemented across all levels of the South African education system; from the GET phase to the FET phase and finally to the HET phase and across the organising field. For the purposes of this research the structure of the DoE, the WCED and the development of the FET phase in schools will be discussed.

## **2.4 SOUTH AFRICAN EDUCATION STRUCTURE**

### **2.4.1 The National Department of Education (DoE)**

The new and current education system is based on the right to education and training that is enshrined in the Bill of Rights. This is done in order to ensure that citizens' freedom of choice is exercised within a social and national context of equality of opportunity and the restoration of inherited imbalances that were brought about through Apartheid. Thus the most important thrusts of the new education policy have centred on the restructuring of school education, the integration of education and training, the transformation of the curriculum, the reconstruction of the bureaucracy and the improvement of the educational infrastructure in general (Hoppers in Hoppers, Mokgatle, Maluleke, Zuma, Hlophe, Crouch, Lombard, Lolwana & Makhene, 2000: 6-7).

The aim of the national system of education and training in South Africa is to encourage citizens to engage in a process of lifelong learning. By integrating education and training in one system, within a credit-based qualifications framework

known as the NQF, all citizens are able to develop their competencies. irrespective of whether they are occupied in full-time or part-time study, employed or unemployed, in general education or in occupational preparation. This is due to the fact that the new education system is learner-centred and outcomes-based (Hoppers in Hoppers *et al.*, 2000: 6-7).

The intention of the South African education and training system is to promote maximum flexibility for horizontal and vertical mobility between levels of the education and training system, both in the formal (universities and colleges) and informal (workplace) sector. This mobility and the integrated education and training system allow any South African citizen the opportunity to enter this system, irrespective of literacy level, competency, level of education and training, age or circumstances (Hoppers in Hoppers *et al.*, 2000: 7).

At a national level the management of education takes place as follows: Prior to 1994 the FET qualification did not equip learners for further learning and for the job market (Department of Education, 2003b: 2). Therefore the FET band required a new qualification. FET programmes provided by schools were controlled by narrow educational concerns and were too general, offering too little or no specialisation. The programmes offered by colleges were too narrow and specialised, and did not equip learners adequately for the social, economic and cultural changes learners would face throughout their lives (Department of Education, 2003b: 2).

A new Further Education and Training Certificate (FETC) has been developed to address these constraints. The FETC is a band qualification registered at Level 4 of the NQF. The purpose of FETC is to equip learners with the necessary knowledge, skills and values that would provide them with access to higher education and the workplace. A South African citizen is provided with a learning opportunity irrespective of socio-economic background, race, gender, physical disability or intellectual ability. When a learner exits the FET phase of the NQF, an employee could be given a brief summary of a learner's competencies (Department of Education, 2003b: 2). This is the advantage of the new FETC; it adequately equips learners for entry into a higher education institution or entry into the world of work. There are a variety of ways in which learners can obtain a FETC.

A learner can obtain a FETC by means of three pathways, namely General, General Vocational and Trade, Occupational and Professional. The focus of this study in the FETC was the general option, because the study was conducted with Consumer Studies teachers who were teaching at high schools.

**(a) Trade, Occupational and Professional Pathway**

The Trade, Occupational and Professional pathways are offered by colleges and industry-based providers through the Service and Education Training Authorities (SETAs). Each SETA has designed programmes with outcomes that are developed into unit standards which learners are required to meet. Programmes are based on the skills required by the workplace and will include learnerships. The programmes designed in this pathway must meet the needs of the communities and the workplace (Department of Education, 2003b: 3).

**(b) General Vocational Pathway**

This pathway is offered by FET colleges. These colleges offer programmes that cover a broad range of vocational skills such as clothing production, hospitality studies, business studies and travel and tourism, to mention only a few. These programmes prepare learners for work and self-employment in small medium and micro enterprises (SMMEs). Schools require the permission from the provincial Member of the Executive Council (MEC) to offer these programmes. There are schools in the Western Cape where these programmes are offered, e.g. Grassdale Senior Secondary school in Grassy Park that offers learners hospitality studies. Programmes of this nature have outcomes that are packaged into unit standards, and learners are required to meet these outcomes (Department of Education, 2003b: 3).

The boundaries between the General Vocational pathway and the Trade, Occupational and Professional pathway will be indistinct and permeable with regard to programme offerings, the generation of unit standards, curriculum delivery and the assessment of learning (Department of Education, 2003b: 2).

**(c) General Pathway**

All schools and some colleges offer this pathway. The National Curriculum Statement Grades 10-12 (General) that is written by the Department of Education is offered predominately in schools. In this pathway learners receive a general formative education based on a broad curriculum that is organised into subjects (Department of Education, 2003b: 3). The researcher of the study under consideration will focus on this pathway, with special reference to the school subject Consumer Studies.

The purpose of the FET curriculum is to intensify the foundation laid by the GET and for specialised learning. The FET curriculum prepares learners for further education and training and employment. It develops learners who would be committed citizens to democracy and contribute to the economic and social development of South Africa. The FET curriculum develops learners holistically; in other words, it concerns the development of knowledge, skills and values, and having the ability to apply it to various contexts in which they live or work (Department of Education, 2003b: 4).

For the purpose of the FETC (General), not all of the twelve organising fields are applicable to the FETC. These organising fields have been combined into broader categories of related subjects to coincide with the rules of combination for the FETC (General) (Department of Education, 2003b: 5). The discipline of Consumer Studies falls into the Services organising field. In this study the research will focus on the secondary level in the FET phase and on Consumer Studies as a school subject. Consumer Studies in C2005 is taught only in Grades 10-12.

A process of reviewing and updating school programmes for Grades 10-12 was initiated in 1999. Its intentions were to write learning outcomes for Grades 10–12 (General) and redesign the Grades 10-12 learning programmes in a way that would meet the learning outcomes. Its aim was to initiate programmes that would equip teachers, managers and officials with the knowledge and skills required to successfully implement the new learning programmes. The review and update was initiated to lay the foundation of the Revised National Curriculum Statement for Grades 10-12 (General) (Department of Education, 2003b: 5).

Summarily, the aim of the review and updating process was to reconceptualise and rewrite the provisional syllabi for Grades 10-12 into new, integrated and inclusive learning programmes that would allow learners and young adults to enter a multitude of career opportunities (Department of Education, 2003b: 5). As this study was located in the FET band, it would be necessary to describe this band. The FET band is particularly important in terms of providing opportunities for all learners in the development of their full potential along the most appropriate pathway. All learners must be supported in realising their expectations to enter Higher Education or the world of work. The way in which the past system organised secondary schooling made it very difficult for poor youths to realise their expectations (Department of Education, 2003b: 13).

#### **2.4.2 Provincial Education**

The aim of the WCED was to ensure that all learners, approximately 900,000 per year in the Western Cape, acquire the knowledge, skills and values required to lead rewarding lives and to contribute to the development of the province and the country. This education is provided by 30, 000 teachers ([www.wced.wcape.gov.za](http://www.wced.wcape.gov.za)).

WCED is divided into seven educational districts, labelled as EMDCs. The aim of these EMDCs was to bring about improved educational management of schools and teacher development support throughout the Western Cape. The WCED wishes to assist schools in becoming accountable learning institutions and enable schools to manage themselves effectively, efficiently and economically ([www.wced.wcape.gov.za](http://www.wced.wcape.gov.za)). Each EMDC promotes parental involvement in schools through school governance and community participation. It also promotes a culture of learning and teaching in schools and local communities. The EMDCs offer a variety of services provided by specialists known as curriculum advisors, who are assisted by the WCED's provincial head office in Cape Town. The services offered include curriculum development and support, specialised learner and teacher support, institutional management and governance support and administrative services such as institutional development and support for Articles 20 and 21 schools, labour relations assistance and administrative services ([www.wced.wcape.gov.za](http://www.wced.wcape.gov.za)).

The seven EMDCs are divided into two categories, namely the metropolitan region of Cape Town, which includes the Metropole Central, Metropole East, Metropole North and Metropole South, and the rural areas of Breede River-Overberg, South Cape-Karoo and West Coast-Winlands ([www.wced.wcape.gov.za](http://www.wced.wcape.gov.za)).

Each EMDC has curriculum advisors who oversee each subject in the various learning fields. The curriculum advisors for Consumer Studies will be the focus area for this research. The role of the curriculum advisor is one of being a facilitator and advisor. The curriculum advisor guides and assists teachers with assessment practices and content to be covered by the learner in the classroom. Curriculum advisors and teachers are allowed to share ideas about types of assessment practices used in the classroom that have succeeded or failed. Clear guidelines are given to teachers about expectations of examination papers in Grades 10, 11 and 12. The examination papers for Grade 12 are discussed in the following year after the final exam has been written. The DoE developed a document that guided curriculum advisors and teachers in teaching, learning and assessment practices.

## **2.5 THE STRUCTURE AND DESIGN OF THE NATIONAL CURRICULUM STATEMENT**

The NCS Grades 10-12 (General) consisted of the following policy documents, namely, the overview document, the qualifications and assessment policy framework and the subject statements (Department of Education, 2003b: 10).

For the purpose of the FET phase learning fields are used, instead of the learning areas used in the GET phase, of which there are eight. The following learning fields were demarcated to link various subject combinations:

Languages (fundamentals); Arts and Culture; Business, Commerce, Management and Service Studies; Manufacturing, Engineering and Technology; Human and Social Sciences and Languages and Physical, Mathematical, Computer; Life and Agricultural Sciences (Department of Education, 2003b: 10). The subject Consumer Studies falls under the learning field of Business, Commerce, Management and Service Studies. Other subjects that fall under this learning field are Accounting, Business Studies, Economics, Hospitality Studies and Tourism A learning field categorises related subjects, and therefore Accounting, Business Studies, Economics,

Hospitality Studies and Tourism are categorised into one learning area (Department of Education, 2003b: 10, 12). These subjects are found in the learning area Business, Commerce, Management and Service Studies, because they allow learners to pursue entrepreneurial opportunities.

Learning fields were introduced, because in the traditional education system subjects focused only on the acquisition of knowledge, without developing skills, values and attitudes in learners. The development of knowledge did not sufficiently equip learners for the job market. Historically a subject was defined as a specific body of academic knowledge and intellectual thought (Department of Education, 2003b: 10 & Jacobs in Jacobs *et al.*, 2004: 65). In an outcomes-based curriculum, an integrated approach is its basic principle (Jacobs in Jacobs *et al.*, 2004: 65). Subjects in the outcomes-based curriculum integrate theory, skills and values. The content of the subjects in an outcomes-based curriculum is determined by its learning outcomes. In the South African context, the learning outcomes should also be aligned with the critical cross-field outcomes and the developmental outcomes. The learning outcomes are flexible and not rigid, making allowances for new and diverse knowledge, skills and values (Department of Education, 2003b: 11). The curriculum in the South African OBE system does not only have to achieve learning outcomes, but also critical cross-field outcomes and developmental outcomes.

In the South African OBE system the critical cross-field outcomes determine the developmental and learning outcomes. Therefore critical cross-field outcomes are broad, standard cross-curricular outcomes that lay the foundation for all learning programmes in the education system. These outcomes were introduced into the education system to ensure that learners were not given knowledge in single fragments, being of little value for entrance into tertiary education or the world of work. Instead teachers, policy makers and Government officials identified skills, abilities and values that learners could apply in their lives after exiting the school system (Jacobs in Jacobs *et al.*, 2004: 95).

The NCS Grades 10-12 (General) is a document representing a policy statement for learning and teaching in schools located in the FET band. The NCS stipulates the policy on curriculum and qualifications in Grades 10-12 (General). This document

describes the knowledge, skills and attitudes that South African learners are required to learn. The NCS (General) is based on the assumption that knowledge in itself is not neutral, but underpinned by the collective vision, mission, values and principles of a people. The purpose of the NCS ensures that learners acquire and apply knowledge and skills in ways that are meaningful to their own lives. In this regard, the current curriculum promotes the idea of grounding knowledge in local contexts, while being sensitive to global issues. Teachers and learners are allowed to interpret the curriculum in a context that is familiar (Department of Education, 2003b, viii).

In Department of Education (2003b: viii) the Constitution of the Republic of South Africa (1996) and the Manifesto on Values, Education and democracy (2001) stipulate that the principles of democracy, human rights, social justice, equity, non-racism, non-sexism and ubuntu be studied. These principles guided the development of this outcomes-based NCS Grades 10 –12 (General) document (Department of Education, 2003b: viii).

## **2.6 OUTCOMES-BASED EDUCATION (OBE)**

### **2.6.1 Introduction**

According to Spady & Marshall (1994) in Pretorius (1998: ix) and Van der Vyver (1998: 152), OBE is nothing new to many teachers, lecturers and practitioners. Subjects such as Consumer Studies, Accountancy, Mathematics, Technical drawings and Languages, among others, have long been using outcomes-based approaches, i.e. integrating knowledge, skills and values. The degree of vocational or entrepreneurial relevance often depended upon the initiative, commitment, creativity and interest of the teacher or learner (Van der Vyver, 1998: 152).

In the democratic South Africa there was a shift away from rote learning or learning by memory only, from the content of the syllabus and textbooks. Instead, learners should develop critical and creative thinking to solve problems. The outcomes-based curriculum views learning and teaching processes differently from the traditional curriculum. Knowledge is not seen as being transferred intact from the teacher to the learner. Instead, knowledge is regarded as something that is constructed in the mind of the learner. Learners bring their own prior knowledge and experience to any learning situation. They make sense of the new knowledge within the context of their

own knowledge and then develop their original concept as learning takes place. The process of learning is just as important as the end-product. The products are the learning outcomes constituted by knowledge, a range of skills and attitudes (Le Grange & Reddy, 1998: 6).

The 1990s indicated political and educational reform for South African citizens. According to Chisolm (1994) in Jansen & Christie (1999: 4), the political and economic pressures followed this call-up to political and educational reform from various liberation movements and the international community. Apartheid South Africa was forced into releasing key political prisoners like Nelson Mandela and unbanning political organisations like the African National Congress (ANC). Jansen in Jansen & Christie (1999: 4) point out that the curriculum significance of the political moment was defined by 1990. Within South Africa certain social movements and political actors were eager to stake their claims about their curriculum positions, since it seemed inevitable that South Africa was going to the polls with the first national non-racial elections.

The eagerness of the social movements and political actors to change the apartheid education system was justified, since Apartheid South Africa implemented a centralised curriculum system that was racially prejudiced, sexist, authoritarian, prescriptive, unchanging and context blind. The irony of the apartheid curriculum policy is that while core curricula were established for all South African schools based on “school subjects”, these curricula were introduced into schools with vastly different resource environments and different consequences in different race-based resource contexts (Jansen & Christie, 1999: 4). To resolve the inequalities in the Apartheid education system, OBE was introduced and referred to as C2005.

Vandeyar & Killen in Fraser, Howie & Plomp (2003: 130) state that in 2000 a ministerial committee reviewed C2005 that included a variety of groups that were involved in education. This ministerial committee was established to streamline the features of C2005, providing the teachers with guidelines as to what was expected with regard to assessment practices, and simplifying its language (Vandeyar & Killen in Fraser *et al.*, 2003: 130; Jacobs in Jacobs *et al.*, 2004: 59).

The revision of C2005 gave rise to the Revised National Curriculum Statement (RNCS) in May 2002, later referred to as the NCS. The new system was based on the OBE approach (Jacobs in Jacobs *et al.*, 2004: 59). The RNCS was no new curriculum, but a streamlining and strengthening of C2005. The RCNS keeps the principles, purposes and thrust of C2005 intact, and affirms the commitment to outcomes-based education. In the words of Kader Asmal, Minister of Education in 2002 (Jacobs in Jacobs *et al.*, 2004:59):

*“This curriculum is written by South Africans for South Africans who hold dear the principles and practices of democracy. It encapsulates our vision of teachers and learners who are knowledgeable and multi-faceted, sensitive to environmental issues and able to respond to and act upon the many challenges that still confront South Africa in this twenty-first century” (Department of Education, 2002: 1).*

In the 1980s, OBE had been introduced globally and by the 1990s the renewal and reform in curriculum development had become a world trend. Curriculum reform and renewal had taken place in countries like Great Britain, the United States of America, Japan, Australia and New Zealand. However, Australia and New Zealand were the first two countries to implement outcomes-based education on a large scale. (Jacobs in Jacobs *et al.*, 2004: 58). The remainder of the above-mentioned countries incorporated strong elements of outcomes-based education (Jacobs in Jacobs *et al.*, 2004: 58). At the same time Jacobs points out that changes in learning content, teaching strategies and assessment methods were among the significant developments in outcomes-based education all over the world. At the same time new terminology was introduced: “aims and objectives” were being replaced by “outcomes” and “pupils” by “learners”. These were only a few of the terms that changed when OBE was introduced in South Africa (Jacobs in Jacobs *et al.*, 2004: 59).

With OBE being a world trend, the South African government announced in March 1997 that the new South African education system would be based on OBE. The newly proposed education system for South African schools was named C2005, because the transformation of the traditional South African education system to the new OBE system would be completed in 2005. When C2005 was introduced, there were negative as well as positive reactions towards this new OBE system. People objected when the new curriculum was developed by government officials and a few

educational experts. Teachers were not asked to provide an input into the new curriculum approach, while teachers were insufficiently trained to implement the new OBE system. It was felt that due to large classes and many under-resourced black schools, not all schools would have the capacity to implement the new OBE system (Jacobs in Jacobs *et al.*, 2004: 59).

The Department of Education (2000: 94) as quoted in Vandeyar & Killen in Fraser, *et al.* (2003: 130) stated that the NCS placed a new focus on assessment, its main purpose being to assess learners in order to enhance individual growth and development, to monitor learner progress and to facilitate learner learning. The assessment practices in OBE focus on developing the learners' knowledge, skills and attitudes, unlike in the traditional South African education that focused on the learner obtaining knowledge and scoring high marks. To change the South African education system from content-based learning, the OBE approach was adopted.

### **2.6.2 The roots of outcomes-based education**

OBE was a curriculum theory that stemmed from four earlier teaching models, namely the objectives movement, mastery learning, criterion-referenced instruction and assessment and competency-based teaching. During the 1960s and 1970s, these two models were adopted by some of the educational departments in the United States of America (Good & Brophy, 1991: 330 in Jacobs in Jacobs *et al.*, 2004: 57).

The idea of an outcomes-based curriculum was first introduced in 1977 by Johnson, an American curriculum specialist. He believed that the perennial curriculum placed too much emphasis on aims and objectives of teachers, instead of on results to be achieved by learners. Johnson argued that the learners were being taught too much theoretical content that did not equip them for the job market. They were force-fed with knowledge that they forgot once they had written the examination. On the other hand, business and technical skills that could be used in the workplace were not being taught. Therefore Johnson felt that the education system should focus on learning outcomes that learners would be able to put to use once they had finished their schooling, instead of concentrating on what teachers should achieve in the classroom. Posner, Spady and Dagget, as well as other supporters of the outcomes approach to

the curriculum, later developed these ideas even further. In this way, a new curriculum movement, namely OBE was developed. It should be noted that OBE is not an entirely new theory that appeared out of nowhere (Jacobs in Jacobs *et al.*, 2004: 57). It had its roots firmly embedded in the educational approaches of educational objectives, competency-based education, mastery learning and criterion-referenced assessment (Malan, 2000: 23).

The first educational approach that is embedded in OBE is the educational objectives movement. In 1950 Tyler identified four key aspects that teachers should consider when developing a curriculum and planning instruction. These four aspects were the educational purpose, including objectives or outcomes, the content of the curriculum, the organization of learning experiences for effective instruction, and the types of assessment methods used to evaluate the effectiveness of the learning experience (Van der Horst & McDonald: 2003: 7; Malan, 2000: 23).

Tyler was specific about the importance of identifying and formulating objectives for educational experience. Tyler indicated that well-written objectives should identify what a learner would be able to perform after teaching had taken place, and that the content should be applicable to the learners' activities. Tyler's ideas about an objective corresponded with an outcome (Van der Horst & McDonald: 2003: 7).

During the 1950s Bloom, a theorist, developed taxonomies referred to as Bloom's taxonomies, where educational objectives were placed in a system ranging, from simple to complex objectives. In other words, objectives were written that would determine whether learners had achieved these objectives on different levels of the cognitive domain – from knowledge through to comprehension, application, analysis, synthesis to evaluation. At present teachers use Bloom's taxonomies to write outcomes which will ensure that learners develop in all areas of cognition, from comprehension right through to evaluation. Therefore Bloom has provided teachers with a framework according to which objectives can be organised for instructional use and assessment. Bloom's work remains invaluable to outcomes-based assessment (Van der Horst & McDonald, 2003: 8; Malan, 2000: 23).

The second educational approach embedded in OBE is the mastery learning movement. According to Guskey, Passaro & Wheeler (1995) in Malan (2000: 23), mastery learning was introduced to provide intervention programmes for learners with mild learning disabilities and those who were at risk in traditional educational settings. This educational approach of mastery learning believes that all learners can achieve most of the outcomes set out in a lesson. This can be realised if learners are given sufficient opportunities and support by an appropriate learning environment, materials and guidance (Malan, 2000: 23; Van der Horst & McDonald: 2003: 10).

The aim of mastery learning is to ensure that learners are granted opportunities to be successful at most tasks on their way to reaching their full potential. It is therefore the responsibility of the teacher to provide an ideal environment for effective learning to take place and to provide learners at all levels of cognition with individualised assistance (Malan, 2000: 23; Van der Horst & McDonald: 2003: 10). This approach is linked to OBE.

The main characteristics of mastery learning were also reflected in OBE and used to determine reasons for learners failing to reach mastery. These characteristics are: diagnosing the missing prerequisite knowledge or skills that would enable learners to attain goals or master an objective. These types of skills and knowledge can be ascertained by means of a diagnostic test. Mastery learning provides learners with a flexible time frame for achieving the educational goals set out by the teacher. In mastery learning teachers can use different types of media or teaching materials to enrich the teaching-learning context. The characteristics of mastery learning are reflected in OBE and therefore formative assessment is used to provide feedback to learners about their progress. It also provides feedback to teachers about whether and in what ways the different types of teaching materials and methods used in the classroom were successful, or whether they require improvement. Even though mastery learning is reflected in outcomes-based education, it is seen as being more teacher-controlled instead of learner-centred (Van der Horst & McDonald, 2003: 10).

Criterion-referenced instruction and assessment is the third educational approach embedded in OBE. Marnewick & Rouhani (in Jacobs *et al.*, 2004: 269) define criterion referencing as points of reference against which learners are assessed. These

criteria are specified beforehand and the learner is only assessed against the criteria set up in the curriculum.

Mpepo (1998) in Malan (2000: 24) describes criterion-referenced instruction as a form of mastery learning. The difference between mastery learning and criterion-referenced instruction and assessment is that the outcomes set out in criterion-referenced instruction have a set of criteria with the level of competence that is stated in the outcome that should be achieved by the learner. Van der Horst & McDonald (2003: 10) define criterion-referenced assessment as testing where a learner's results are compared to a set standard. The DoE has a set standard of testing in the form of a rating scale. The scale is illustrated in Table 2.2.

**Table 2.2: Scale of achievement for the National Curriculum Statement Grades 10-12 (General)**

Rating code	Rating	Marks (%)
7	Outstanding achievement	80-100
6	Meritorious achievement	70-79
5	Substantial achievement	60-79
4	Adequate achievement	50-59
3	Moderate achievement	40-49
2	Elementary achievement	30-39
1	Not achieved	0-29

(Department of Education, 2008: 5).

In criterion-referenced assessment, learners' results are not compared to one another as in the traditional South African education system, but to a given or set criterion or standard of performance. Criterion-referenced assessment measures the mastery of specific outcomes. Criterion-referenced measurement is appropriate for OBE, because it places a learner's test on a scale ranging from incompetence to excellent or perfect performance. The tasks a learner must perform and the criterion level that indicates an acceptable level of achievement are situated along this scale (Van der Horst & McDonald, 2003: 12).

Criterion-referenced results inform the teacher and learner how well a task has been performed, and which outcomes learners can or cannot achieve under certain

conditions (Van der Horst & McDonald: 2003: 10). These conditions include the learning environment, teaching method, types of media used in the classroom and the assessment methods implemented. The results should be interpreted by the teacher and used to adapt the instructional process, e.g. a change of method for explaining a difficult concept, or more learning time and additional examples to illustrate a concept. Criterion-referenced measurement is therefore regarded an assessment tool that can be used with very good effect in the outcomes-based classroom. Criterion-referenced assessment forms part of the assessment process and is the preferred mode of assessment in OBE (Malan, 2000: 24; Van der Horst & McDonald, 2003: 11).

The fourth and final approach embedded in OBE is competency-based education. This educational approach was introduced in the United States of America towards the end of the 1960s. The reason for the establishment of this approach was a reaction to the business sector's concerns about learners lacking the skills required in the world of work (Van der Horst & McDonald: 2003: 10).

At the time, competency-based education focused on the integration of outcomes and goals in terms of skills that needed to be mastered by learners. Competency-based education also integrates teaching methods and assessment tools. Unfortunately competency-based education was practised as a testing and remedial programme. Competency-based education failed, because education officials could not agree on the essential "competencies" that had to be achieved in this type of curriculum (Van der Horst & McDonald, 2003: 9).

Van der Horst & McDonald (2003: 9) state that the term competence could include any of the following: survival or life skills, basic skills, psychomotor skills, professional and vocational skills, intellectual skills, interpersonal skills and personal skills. South Africa was also concerned that its learners were not equipped with skills for the workplace. Therefore competency-based education is one of the educational approaches embedded in OBE in South Africa, as it would equip learners with the essential competencies to cope with the world after leaving school.

Six critical components characterise a complete competency-based education programme. Firstly it includes explicit learning outcomes with regard to the required

skills and level of competency in the skills taught in the curriculum. Secondly, learning time is flexible in that learning takes place inside and outside the classroom. Thirdly, a variety of instructional materials are used to facilitate learning. Fourthly, outcomes are assessed through criterion-referenced testing. Fifthly, the certification of a learner of any particular grade depends on how competently the learner can demonstrate the outcomes. Lastly, programmes are adapted to ensure that the learner has optimal guidance (Van der Horst & McDonald, 1997: 10-11). All six components are evident in the OBE approach.

It can be deduced that competency-based education supports individual learning by teachers and learners who are goal-orientated, a major component of OBE. The teaching-learning process is facilitated if the teacher knows what he/she wants the learners to learn, and if the learner knows what he/she is required to learn. Accountability for learning is required from learners in competency-based education. These characteristics all underpin OBE (Malan, 2000: 23; Van der Horst & McDonald: 2003: 9).

Summarily, the four educational approaches: educational objectives, mastery learning, criterion-referenced assessment and competency-based education collectively form the theoretical foundation of OBE, because many of the characteristics of these four approaches are integrated (Van der Horst & McDonald: 2003: 11).

### **2.6.3 Principles of outcomes-based education**

Spady, the forerunner of OBE, identified four principles related to this educational approach. Spady (1994: 10) identified four principles, namely clarity of focus, expanded opportunity, high expectations and design down.

Firstly, clarity of focus was the principle that assisted teachers to establish a clear picture of the type of learning to be demonstrated by the learner in a lesson or learning programme. The learners' successful achievement of the outcomes becomes a priority for instructional planning and learner assessment. Therefore the clear picture of the desired outcomes is the point of departure for curriculum, instruction and assessment

planning and implementation. All these factors align the learning outcomes to be achieved by learners. Finally, in this feature the teaching methods used by the teacher begin with the teacher sharing, explaining and adapting the outcome, so that learners are constantly aware of the teacher's expectations. This process enables teachers and learners to work as a team to achieve a clear and visible goal (Spady, 1994: 11).

In terms of lesson planning, each teacher can determine how the outcomes will be met through using various teaching strategies. Teachers in the outcomes-based system can allow learners to explore areas of learning that are related to or complement the identified outcomes in a particular learning programme. Therefore OBE provides a very clear purpose and direction, but the principle of expanded opportunity encourages flexibility in the achievement of outcomes.

The second principle underwritten by Spady (1994: 12) is that of expanded opportunity, providing teachers with multiple opportunities to successfully demonstrate learning in a particular lesson or learning programme. Spady (1994: 13) identified five dimensions that were related to the principle of expanded opportunity, namely time, methods and modalities, operational principles, performance standards and curriculum access and structuring. The first dimension, which is time, takes on three distinct forms: firstly, teaching time or the duration of learning opportunities, referring to, the amount of contact time that learners spend with the teacher. The second dimension reflects the learning time or the frequency of learning opportunities. This relates to the number of times that an education system provides for a learner to achieve an outcome before the prescribed time has elapsed. A third dimension concerns eligibility, or the precise timing of when these learning opportunities can occur, meaning the time span allowed by the education system for learners to master an outcome. The dimension of time in OBE is seen as a flexible, rather than a rigid entity (Spady, 1994: 13-14).

Spady (1994: 14) suggests that expanded opportunity goes further than time and timing. The second dimension of expanded opportunity centres around methods and modalities or procedures. This implies that teachers are at liberty to use a variety of teaching methods and instructional methods to expand the learning opportunity for learners, and not only to manipulate the dimension of time (Spady, 1994: 14).

Therefore teachers can plan teaching methods such as cooperative learning, instead of relying only the lecture method in the classroom, to enhance the learning experience.

The third dimension of expanded opportunity, which is operational principles, is related to the other three principles of OBE, namely clarity of focus, high expectations and design down. The opportunity for learning success will expand remarkably if teachers apply these principles consistently, systematically, creatively and simultaneously in the classroom. Clarity of focus enhances the opportunity for learning by providing clear outcomes for learning performance. High expectations motivate learners to achieve success, while the design-down principle provides a clear path for learners to follow and achieve the desired outcomes (Spady, 1994: 14).

The fourth dimension of expanded opportunity is performance standards (Spady, 1994: 14). In the South African OBE system, the NCS has used the concept of assessment standards instead of performance standards. The Department of Education (2003b: 11) has defined it as criteria that provides evidence of the knowledge and skills that learners should achieve in each grade. Therefore Spady (1994: 37) indicates that learners must demonstrate all the criteria that constitute an outcome to successfully achieve a performance standard.

The fifth and final dimension of expanded opportunity relates to curriculum access and structuring. This dimension allows learners access to the curriculum of the country, its resources and an understanding about how the curriculum is structured (Spady, 1994: 15). The DoE must offer all learning programmes to all learners in the South African education system, as well as the resources that go with these learning programmes, such as computers, Consumer Studies facilities and any other resources that would enhance the learning experience. In the Consumer Studies curriculum the teachers must provide and expose the learners to entrepreneurial opportunities on a regular basis. If access is limited to fixed, single-chance events, learners' opportunities for learning and future success are hindered. Alternatively, if learners were constantly exposed to critical learning experiences at higher levels of complexity each time throughout their school career, it would internally motivate learners to become lifelong learners (Spady, 1994: 15).

For meeting the principle of expanded opportunity, learners must perform all the criteria of an outcome, and if it is not achieved, the learner must take the responsibility for achieving it. The teacher must encourage learners to achieve an expanded opportunity at its highest level from the onset of the learning experience (Spady, 1994: 15). This proceeds to the next principle, which is high expectations.

Spady's third principle for OBE is high expectations. Spady (1994: 17) defines high expectations as a desire to have learners perform at higher levels and working with these learners to increase the likelihood that high levels of performance are reached. This implies that learners are challenged to constantly achieve higher standards than previously. Therefore the level of challenge is constantly increased. OBE has applied this principle to three aspects of school practice, referred to as dimensions of high expectations, namely standards, success quotas and curriculum access. The standard of completed or passed work has increased in OBE. This is achieved with the other principles of OBE, which is clarity of focus, expanded opportunity and design down. Learners therefore have to achieve a higher minimum standard compared to the South African traditional education system. The traditional education was not concerned about the achievement of outcomes; its only focus was on passing or failing an exam, which was monitored on a bell-shaped curve. With OBE the bell-shaped curve or quota grading system has been abandoned in favour of criterion-referenced systems that also assist in improving the standard of achievement (Spady, 1994: 16-17).

The OBE system has eliminated low-level courses or learning programs, because learners will achieve the level of challenge put to them (Spady, 1994: 17). Therefore the South African education system has abolished the higher grade and standard grade system in various subjects to increase the level of achievement for students. Consequently all learners, irrespective of their ability, must attain the same level of outcomes. Spady (1994: 17) indicated that according to experience, applying the dimension of high expectations namely standards, success quotas and curriculum access, changed a school's learning climate and ethos, resulting in high learner achievement and motivation on more challenging levels of learning.

The fourth and final principle of OBE is the design-down principle. Design down means that when teachers begin the curriculum and lesson planning, the point of departure is where learners are expected to ultimately end up (Spady, 1994: 18). This

means that the outcomes for a lesson or learning programme are first established before methods used to achieve the outcomes are thought through. Spady (1994: 18) classified outcomes into three broad categories namely, culmination, enabling and discrete. Culminating outcomes define the outcomes that must be achieved by all learners in an education system. Culminating outcomes are synonymous with exit level outcomes (Spady, 1994: 18). In the South African education system each learning programme has exit level outcomes that have to be achieved by the time learners exit Grade 12. Following on culminating outcomes, there are enabling outcomes, the key building blocks on which culminating outcomes depend. These outcomes are essential for learners' holistic development (Spady, 1994: 18). In the South African education system it is called critical cross-field and developmental outcomes. It is imperative that South African learners achieve these outcomes by the end of Grade 12, as it equips them for higher education or the job market. The last type of outcome as stated by Spady (1994: 18) is discrete outcomes. These outcomes are "nice to know" elements and are not essential to the culmination of outcomes or to the development of a learner (Spady, 1994: 18). Through these types of outcomes, teachers are able to determine the skills, knowledge, values and attitudes that underlie a curriculum and are essential to a curriculum. They are advantageous, but not necessarily implemented in the curriculum within a specified time frame.

These four principles of OBE can be applied in a structured and flexible manner (Spady, 1994: 21). In the South African context it can serve as a guide, indicating how OBE is required to function in schools to be of benefit to learners, teachers and the broader public.

Malan (2000: 24) states that the features to be discussed are the main and distinctive features of the outcomes-based approach. OBE is needs-driven in that the curricula is designed in terms of the knowledge, skills and attitudes or values that are required to equip learners for lifelong learning and for the world of work.

Therefore OBE is outcomes-driven and plays a key role in the execution of this new education and training system (Malan, 2000: 24; Van Rensburg in Pretorius, 1998: 41). This model follows a route that starts at determining the needs of learners, and proceeds to setting a purpose for the learning programmes, the outcomes needed to

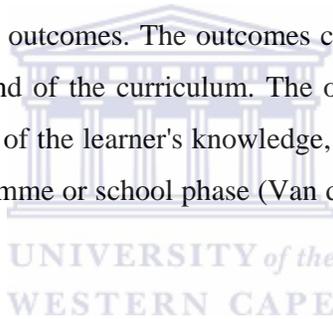
achieve the goal, and finally the assessment of the outcomes. By following this route, it will be possible to determine if the purpose of the learning programme has been achieved (Malan, 2000: 24). Therefore OBE is focused on the mastering of processes linked to the intended outcomes, as well as mastering knowledge and skills required to achieve the outcomes (Olivier, 1998: 21).

#### **2.6.4 Features of outcomes-based education**

Twelve features are engrained in an OBE curriculum. These are the reasons why the South African government changed the South African education curriculum from the traditional education system to the outcomes-based approach. It focuses on teachers and learners as resources of knowledge. The features will now be discussed.

##### **1. Outcomes-based**

The general feature includes outcomes. The outcomes clearly indicate what a learner is required to learn at the end of the curriculum. The outcomes-based curriculum is focused on the development of the learner's knowledge, skills, values and attitudes at the end of the lesson, programme or school phase (Van der Horst & McDonald, 2003: 12).



##### **2. Value-oriented**

Jacobs (in Jacobs *et al.*, 2004: 60) states that OBE should instil values such as independence, creativity, cooperation, a sense of responsibility, an enquiring mind, communicativeness, environmental consciousness, tolerances and the values embedded in the critical cross-field outcomes. All OBE programmes should be relevant to the current and anticipated future needs of the individual and society (Lubisi *et al.*, 1997: 5).

##### **3. Relevance**

There is evidence indicating that for a country to remain economically competitive in the international arena, and for its economic growth, the population needs to be well educated. The educational programmes provided by the country should equip citizens with competencies and skills required by the economy, and those that are essential for citizens to lead productive, self-fulfilled lives. The OBE system should encourage

lifelong learning to develop citizens, equipping them with new knowledge, skills, competencies and values. The learning programme should educate learners to become technologically literate and environmentally aware and responsible. (Lubisi *et al.*, 1997: 5; Van der Horst & McDonald, 2003: 61). The selection of content for teaching and learning should reflect the cultural diversity of South Africa. It should also teach learners to recognise the uniqueness of South Africa's multicultural society and reflect cultural sensitivity (Lubisi *et al.*, 1997: 5).

#### **4. Integration**

In the traditional South African education system, theory and practice were seen as separate entities. This kind of system did not educate learners to become multiskilled. The reason being that the content of the subjects were seen as separate items and were not mutually integrated. In OBE the subjects have been combined with one another to form various learning areas, e.g. Consumer Studies combining Home Economics and Needlework and Clothing. Therefore the skills relating to different subjects are combined to provide a multidisciplinary approach to the curriculum (Lubisi *et al.*, 1997: 6; Van der Horst & McDonald, 2003: 61).

#### **5. Differentiation, redress and learner support**

Van der Horst & McDonald (2003: 61) state that individual differences between learners must be acknowledged. This means that teachers should be challenged to research a variety of alternative methods and approaches and that unique talents and limitations should be adequately addressed. These alternative methods and approaches should allow learners to learn at their own pace, rather than at the pace of other learners in the classroom (Lubisi *et al.*, 1997: 6-7; Van der Horst & McDonald, 2003: 12). OBE makes provision for learners with learning disabilities in mainstream education through special support when necessary (Lubisi *et al.*, 1997: 7).

#### **6. Nation-building and non-discrimination**

Learning programmes in OBE encourage the development of mutual respect for diverse religious and value systems, multilingualism, civic responsibility and an understanding of national, provincial, local and regional developmental needs. The behaviour of teachers and learners should reflect non-discrimination against anybody

irrespective of race, gender, religion, age and other forms of discrimination listed in the Constitution (Lubisi *et al.*, 1997: 7; Van der Horst & McDonald, 2003: 70).

### **7. Critical and creative thinking**

Lubisi *et al.* (1997: 8) indicate that OBE programmes should promote learners' ability to think logically and analytically, as well as holistically and laterally. OBE accepts that learners are independent thinkers and that the teacher is not the only dispenser of knowledge; the learners also have experiences and knowledge that can be reflected upon. Besides being independent thinkers, learners should have the ability to function as part of a group, listening to and respecting others' opinions.

### **8. Flexibility**

Programmes presented in an outcomes-based approach should be flexible by offering learners a range of learning opportunities. Learners should choose what, where, when, how learning is to take place (Lubisi *et al.*, 1997: 8).

### **9. Progression**

In the South African OBE system, there is an integrated approach to education and training that is linked to the NQF. This allows learners to obtain credits for learning outcomes that have been achieved, irrespective of where and when the outcomes were met. This allows learners to study at any educational institution and to progress in a particular programme or course by meeting the learning outcomes, rather than through age or course cohorts (Lubisi *et al.*, 1997: 9).

### **10. Credibility**

According to Lubisi *et al.* (1997: 9) learning programmes should have national and international credibility. With regard to national credibility, it is important that South African citizens should value the OBE system as being valid, relevant and of high quality. Acknowledging the need for both national and international credibility, is an indication that the learning areas described in the curriculum framework and the national standards or critical cross-field outcomes should meet a nation's needs, without deviating too much from international standards. If learning areas or learning standards deviate too much from the rest of the world, its credibility would be under

scrutiny and competitiveness and mobility in the workplace would be restricted (Lubisi *et al.*, 1997: 9).

### **11. Quality assurance**

SAQA monitors the quality of education and training in South Africa. SAQA approves the learning outcomes and assessment criteria for the learning areas. The learning outcomes and assessment criteria for the learning areas in the GET band are determined by their respective Qualifications Councils and set out in national guideline documents for each learning area. For the learning area of Consumer Studies the guideline document is named the National Curriculum Statement Grades 10-12 (General): Consumer Studies. This document contains the learning outcomes and assessment criteria for Grades 10-12. The introduction of these national guideline documents guides curriculum development and ensures an education system that promotes quality and equity for all learners (Lubisi *et al.*, 1997: 10).

### **12. Transparency**

The final feature of OBE is that it is meant to be transparent in that learners are aware of the learning materials to be used, the tasks they need to complete and how they will be assessed. Outcomes require a greater use of self-referenced and criterion-referenced assessment. These outcomes provide a specific answer to what the teacher should cover and what should be assessed. Many kinds of evidence can be used to assess outcomes. (Siebörger & Macintosh, 2004: 56).

#### **2.6.5 The learner and outcomes-based education**

In OBE the role of the learner changed from being seen as an 'empty vessel' to being a carrier of knowledge and an independent thinker.

The first principle of OBE to benefit learners is the fact that the curriculum is learner-centred. The outcomes-based curriculum places the learner first by recognising and building on their knowledge and experience, as well as responding to their needs, incorporating experiential learning theory. The learning content of the curriculum should focus on developing learners' knowledge, skills, attitudes and values. The learner is an active and interested participant in the learning process (Van der Horst &

McDonald, 2003: 12). Different learning styles and rates of learning need to be acknowledged and accommodated in the learning environment and in the attainment of qualifications.

The ways in which different cultural values and lifestyles influence the construction of knowledge should be acknowledged and incorporated into the curriculum of learning programmes. A prerequisite for all forms of learning and development consists of providing learners with positive learning experiences through affirmation of their self-worth. This could be demonstrated by respecting all learners' cultural, language and personal circumstances. Teachers could also motivate learners by acknowledging achievements at all levels of education and training. Teachers can acknowledge the development of learners' abilities and their will to work cooperatively and independently. Learners should be encouraged to reflect on their own learning progress and to develop skills and strategies needed to study through open learning, distance education and multimedia programmes (Lubisi *et al.*, 1997: 4).

The second principle of OBE that has particular relevance for learners, is that the learner's progress is based on demonstrated achievement. This means that the focus of the learning process is on the application of the knowledge, skills and attitudes. It differs from the traditional South African education system where the focus was only knowledge-based, with specific bodies of content being taught. In OBE learners are not automatically promoted to the next grade, but need to demonstrate the achievement of the outcomes in a competent manner. The assessment of outcomes takes place on a continuous basis as the learning programme proceeds, and also at the end of a lesson, unit or programme (Van der Horst & McDonald, 2003: 12). OBE therefore provides for both formative and summative assessment.

The third principle of OBE focusing on learners is that each learner's needs are met by teachers using a variety of teaching strategies and assessment tools. A teaching strategy is a broad plan of action for teaching activities with a view to achieving one or more outcomes (Van der Horst & McDonald, 2003: 12; Mahaye & Jacobs in Jacobs *et al.*, 2004: 175). According to Mahaye & Jacobs in Jacobs *et al.* (2004: 175) a teaching strategy gives an outline of an approach that a teacher will use to facilitate

teaching and learning activities. In OBE a teaching strategy is a combination of four elements, namely teaching methods, types of media, learner activities and learning content (Mahaye & Jacobs in Jacobs *et al.*, 2004: 175). Through continuous assessment, teaching strategies can be reviewed and changed to meet the needs of the learners (Van der Horst & McDonald, 2003: 12).

The fourth principle of OBE of special significance for learners is that each learner be provided with the necessary time and assistance required to reach their full potential. Even though teachers provide time and assistance to learners, all learners have to take responsibility for their own learning through hard work and dedication. All learners have to work toward becoming more independent in their learning and thinking. Besides the teacher's assessment, learners should self-assess their progress throughout a learning unit or programme (Van der Horst & McDonald, 2003: 12).

According to Van der Horst & McDonald (2003: 12) the OBE system develops the learner into becoming a responsible person; a self-directed, independent learner; an effective communicator; a critical, purposeful thinker; a productive worker and a problem solver. These characteristics can be instilled if the teacher implements teaching strategies that equip learners to develop their personal skills and become lifelong learners, functioning as productive South African citizens.

### **2.6.6 The teacher and outcomes-based education**

The teacher is seen as a facilitator in the learning process and a determining factor in classroom activities. For participative and reflective learning to occur, it would depend on the teacher's implementation of his/her personal theoretical frameworks regarding what teaching entails and how human beings learn (Lubisi *et al.*, 1998: 24). The role of the teacher refers to the functions performed by the teacher as the facilitator of learning (Vakalisa in Jacobs *et al.*, 2004: 24). The Department of Education (2000: 13-14) identified the seven roles of teachers.

The first role of a teacher is that of being a learning mediator. The teacher has to mediate learning in a manner that is sensitive to the diverse needs of learners, including those with barriers to learning. This requires a reflective teacher who

understands learners and their socio-economic-cultural backgrounds. As a mediator the teacher must construct learning environments that are appropriately contextualised and inspirational, while creating learner-friendly interactive learning situations. To create learner-friendly interactive learning situations the teacher must demonstrate a sound knowledge of subject content and of various principles, teaching strategies and resources appropriate to teaching in a South African context, as well as a sound background in educational theory. The role of the 'learning mediator' implies taking learners through learning materials in a manner that maximises learning (Van der Horst & McDonald, 2003: 80; Vakalisa in Jacobs *et al.*, 2004: 26).

Secondly the teacher fulfils the role of an interpreter and designer of learning programmes and materials. In exercising this function, the teacher must identify the requirements for a specific context of learning. This is done by preparing suitable textual and visual resources for learning. The teacher will select the sequence, pacing the learning in a way that is sensitive to the differing demands of the learning area and the needs of learners. As an interpreter and designer of learning programmes and materials the teacher must be a reflective critical thinker, possessing a thorough knowledge base of the subject matter that is to be taught. The learning content is intended to assist learners to gain a better understanding of life's realities and to establish a solid foundation to interact with the world. Besides being a subject specialist, teachers are required to be sensitive to learners' diverse cultural backgrounds. Teachers should acknowledge their shortcomings regarding the accommodation of diversity in relating to learners or their presentation of the subject matter in the classroom. By acknowledging their limitations in cultural diversity, teachers can make a conscious effort to guard against making statements that may offend learners. To accomplish the role as a mediator, the teacher needs to be a reflective practitioner, who is introspective and who strives toward understanding him- or herself as well as the individual learners (Van der Horst & McDonald, 2003: 80; Vakalisa in Jacobs *et al.*, 2004: 26).

The third role of the teacher is to lead, manage and be an administrator. In this role the teacher will lead and manage learning in the classroom, carry out administrative duties efficiently and participate in the school's decision-making structures. The teacher has more life experience than the learners, as well as the power of theoretical

knowledge, to which learners have not yet been exposed. Therefore the teacher is expected to take on the role of the leader, directing the pathway for teaching and learning to be followed in the classroom. Attributes that a teacher possesses to fulfil the role as a leader, manager and administrator, include knowledge of content, knowledge of learners, commendable interpersonal skills and good classroom management skills (Van der Horst & McDonald, 2003: 80; Vakalisa in Jacobs *et al.*, 2004: 26).

In the fourth instance, teachers are to continue their roles as scholars, researchers and lifelong learners. The teacher will achieve ongoing personal, academic, occupational and professional growth through pursuing reflective study and research in his/her learning area(s), in broader professional and educational matters, and in other related fields. A teacher cannot remain competent if there is a lack of motivation to acquire current information in his/her learning area. Teachers must remain informed with regard to new developments taking place in the learning area specialisations, and they should be knowledgeable about life, because no learning area is isolated from the reality of the world (Van der Horst & McDonald, 2003: 80; Vakalisa in Jacobs *et al.*, 2004: 28).

As a scholar, the teacher should read extensively about their field of study, taking note of related fields and current debates presented in the mass media such as newspapers, magazines and television. These scholarly actions illustrate to learners how the content of the learning area should be integrated into other learning areas. Of more significance is that teachers are demonstrating to learners the importance of reading and critical thinking about what one reads (Van der Horst & McDonald, 2003: 80; Vakalisa in Jacobs *et al.*, 2004: 28). Clarke & Biddle (1992: 2) in Vakalisa in Jacobs *et al.* (2004: 28) suggest that the teacher as a researcher needs to devise questions that will guide learners through a vast pool of potentially useful information.

Jalonga (1991: 3) in Jacobs *et al.* (2004: 28) states that 'the highest purpose of teaching is to promote the types of learning that encourage learners to continue to learn, not only inside the classroom but also outside the classroom and throughout life'. To encourage the practice of lifelong learning in learners, the teacher is required to be a lifelong learner him/herself. It is a commonly accepted view that a basic

education is seen as a foundation for independent lifelong learning that continues beyond the age of compulsory education (Vakalisa, 2000: 178 in Jacobs *et al.*, 2004: 28).

Through various levels of education, learners are exposed to a wide variety of sources of knowledge, including books other than prescribed textbooks, the internet, mass media like television and radio, encyclopaedias and human beings other than teachers. Learners need to be taught how and when to use these resources. For this learning to occur, the teacher should be a good role model for scholarship. For learners to value knowledge and engage in the search for more knowledge, the teacher has to display enthusiasm and enjoyment in reading and learning about new concepts. A teacher of this calibre keeps abreast of new developments in their field of interest or learning area. Besides keeping abreast of new developments, the teacher always has new information to impart to the learners and relevant sources to refer learners to for further study. When a teacher fosters scholarship in learners in his/her learning area, it motivates learners to become lifelong learners (Vakalisa in Jacobs *et al.*, 2004: 28).

Community involvement, citizenship and a pastoral role are components of the fifth role executed by a teacher. In this capacity the teacher will practise and promote a critical, committed and ethical attitude, nurturing the development of a sense of respect and responsibility towards others. The teacher will uphold the constitution and promote democratic values and practices in schools and society. Within the school, the teacher will demonstrate an ability to develop a supportive and empowering environment for learners and respond to the educational and other needs of learners and fellow teachers (Van der Horst & McDonald, 2003: 80; Vakalisa in Jacobs *et al.*, 2004: 24-25).

Since learners spend the bigger part of the day at school, teachers have been given the status of being representatives of parents. Besides facilitating and teaching the content of the learning area, teachers educate learners to become responsible South African citizens who will uphold and defend the values of the country. Learners are taught how to protect the natural resources; show respect for human life and tolerance for cultural diversity. Teachers teach learners to live as selflessly as possible and show compassion toward people that are less fortunate than themselves. Learners can adopt

the values mentioned above if the ethos of the school is based on these values. These values can also be adopted by learners through observation of how teachers relate to one another and to learners. As a consequence these values must be evident in all interaction between teachers and learners and the management of the school. Therefore the principle of teaching and educating by example is an important attribute in a learning environment (Vakalisa in Jacobs *et al.*, 2004: 28).

The teacher as an assessor is the sixth role performed by a teacher. The teacher will understand that assessment is an essential feature of the teaching and learning process. The teacher must have an understanding of the purposes, methods and effects of assessment and know how to integrate them into the learning process. These assessment practices implemented by the teacher must provide learners with helpful feedback (Vakalisa in Jacobs *et al.*, 2004: 25). The teacher will assess the learners' competence on a continuous basis and adapt instruction to meet the apparent learners' needs (Van der Horst & McDonald, 2003: 81).

The teacher will design and manage both formative and summative assessment in ways that are appropriate to the level and purpose of the learning environment. If learners successfully complete the assessment tasks set for them, the teacher will be satisfied because it demonstrates that the learners understand the learning content. It is impossible for the teacher to measure exactly how much learning had taken place from a teaching-learning encounter. Therefore multiple assessment techniques such as written projects, tests, self-assessment and portfolios are used by teachers to assess if meaningful learning had in fact taken place. The teacher will keep detailed and diagnostic records of assessment. The teacher will understand how to interpret and use the assessment results to improve and adapt learning programmes to meet the needs of the learners (Vakalisa in Jacobs *et al.*, 2004: 25). In OBE it is important that learners are assessed to determine the extent to which the intended outcomes have been achieved by each learner (Vakalisa in Jacobs *et al.*, 2004: 25).

The seventh role of the teacher, as stated by the Department of Education (2000: 14), is that of a learning area/subject/discipline/phase specialist. In this role the teacher will be well grounded in the knowledge, skills, values, principles, methods and procedures relevant to the discipline, subject, learning area, phase of study and

professional or occupational practice. The teacher needs to have a clear vision of how the content being taught can benefit the learner with advanced learning possibilities in the discipline. The vision of the teacher will assist in designing enrichment learning materials and tasks for advanced learners, and remedial material for learners with learning difficulties. The teacher has knowledge about different approaches to teaching and learning and is able to design learning materials that are appropriate for the learner and the context. The teacher will have a well-developed understanding of the knowledge appropriate to the learning area, subject, discipline or phase. Besides the knowledge of the subject matter required by the learning area, subject, discipline or phase, the teacher must also have pedagogical knowledge of how human beings learn. The teacher must have a knowledge base about teaching theories, which would relate to teaching and learning styles and methods, psychology of education, philosophy of education and educational management, especially classroom management (Van der Horst & McDonald, 2003: 81; Vakalisa in Jacobs *et al.*, 2004: 25).

Besides the seven roles stipulated by the Department of Education (2000: 13-14), Nonhlanhla & Vakalisa (in Jacobs *et al.*, 2004: 351) discuss the teacher as a facilitator. An important principle about OBE is that the teacher should act as a facilitator of learning rather than a dispenser of knowledge. The teacher as a facilitator is required to create an atmosphere that allows learners to learn either independently or in groups. The teacher must plan problem-based activities that allow learners to identify problems and find solutions.

The teacher in the outcomes-based paradigm is expected to arouse an inquiring mind, critical thinking and creativity among learners. The teacher as a facilitator is required to manage different learning situations at different times. These learning situations can include giving instruction to an entire class before embarking on a class activity, or assigning tasks to small groups or learners working on their own. Therefore an outcomes-based classroom will not always have quietness or stillness as in the traditional classroom, because learners are active participants in classroom activities. These classroom activities could require learners to discuss the subject matter in groups, to move about for collecting materials from a central point, or to explain content to their peers (Vakalisa in Jacobs *et al.*, 2004: 25). The teacher as a facilitator

allows learners to be active participants in the classroom, instead of remaining passive learners.

Nieuwoudt and Beckley in Jacobs *et al.* (2004: 315) indicate that the teacher is a decision maker. The teacher must make appropriate decisions when planning lessons on a daily basis. The decisions taken by teachers provide important inputs that determine and guide the planning of lesson programmes and lessons that will eventually be implemented. Decisions about lesson plans would relate to teaching methods, types of media to be used in the classroom, types of learner activities, content to be taught in the classroom and types of assessment activities. Borich (2000: 111-113) in Nieuwoudt & Beckley in Jacobs *et al.* (2004: 315) maintain that before lesson planning can take place, the teacher must have knowledge about learning outcomes, learner characteristics, subject matter, teaching methods and tacit knowledge. This indicates that the teacher needs to be knowledgeable about various aspects of the OBE lesson before embarking on decisions about the lessons to be taught to learners on a daily basis. Therefore, in the outcomes-based approach, the teacher as a decision maker has the freedom to plan teaching strategies that are applicable to the context and its learners.

The final role of the teacher is that of a mentor. According to Van der Horst & McDonald (2003: 239), in OBE the teacher should fulfil the role of a mentor to the learners. With the breakdown of family life in today's society and the decline of extended family practices, many learners do not have role models in their lives. Teachers therefore have to fulfil the roles of mentors in the learning context and in learners' personal lives. Van der Horst & McDonald (2003: 239) define a mentor as a counsellor, stating that a good mentor possesses the qualities of a role model, a guide, a supporter, a trusted counsellor, a leader and a friend. Other qualities of the teacher as mentor include a willingness to help learners, the ability to observe confidentiality, an interest in the learner's well-being, enthusiasm about assisting learners, affection toward learners, being available for learners at the teacher's convenience, as well as believing in networking and mutual respect between teachers and learners. A teacher should apply these qualities to guide learners in a positive way (Van der Horst & McDonald, 2003: 239). From the discussion it is clear that the teacher employing the

outcomes-based approach is not merely a carrier of knowledge, but a multiskilled individual.

Spady (1994: 1), being the pioneer of OBE, therefore defines OBE as a comprehensive approach to organising and operating an education system that is focused on and defined by the successful demonstrations of learning sought from each learner. Outcomes are clear learning results that learners are expected to demonstrate at the end of a significant learning experience, and are actions and performances that embody and reflect learner competence in using content, information, ideas and tools successfully (Spady, 1994: 2).

### **2.6.7 Outcomes-based education as an approach: transformational**

Malan (2000: 26) state that contrary to the transmission approach of traditional teaching, the transformation approach epitomised OBE. Spady (1994: 94) characterised OBE as a transformation approach. This statement could be made on the grounds that traditional, teacher-centred education with its focus on the transmission of knowledge only, was replaced by OBE, allowing learners to enter into dialogue with the curriculum where they could interact with various sources of knowledge, reconstruct knowledge and take responsibility for the achievement of his or her own learning outcomes (Spady, 1994: 95-96). On the other hand, the teacher became a facilitator in the teaching and learning process, instead of someone who would merely transfer knowledge to learners.

Educational reform can be introduced through various approaches. OBE is an example of educational reform. The one idea that is dominant in the outcomes-based approach is the commitment to learning for all learners, and a success orientation for all. This is a typical principle of “transformational OBE”, which is a collaborative, flexible, trans-disciplinary, outcomes-based schooling system aimed at empowering learners. Advocates of transformational OBE are in general future-orientated and visionary people, optimistic and focused on growth and success. Teachers who willingly accept the approach of transformational OBE embrace rather than fear curriculum change (Van der Horst & McDonald, 2003: 20).

Spady (1994: 36) identified ten key components or characteristics that underlie transformation OBE, or OBE as a transformational approach. These two terms will be used interchangeably. Table 2.3 presents the ten key components of OBE, qualifying it as a transformational approach. The first column represents the characteristics of OBE as well as the educational approaches that underlie OBE. The second column depicts the transformational aspects applicable to each of the characteristics in the first column. Each of these characteristics will be classified under the educational approaches of educational objectives, competency-based education, mastery learning and criterion-referenced assessment (Malan, 2000: 27).

**Table 2.3: Characteristics of outcomes-based education**

Characteristics	Transformational aspects
<p>1. OBE is defined by outcomes.</p> <p>It is based on the educational approaches of educational objectives, competency-based education and mastery learning.</p>	<p>Learners are future-orientated. The outcomes inform learners what they have to achieve and the quality of the work that should be achieved to meet the outcomes. The process shifts from content-based input approach to a competency-based output approach where a qualification validates the achieved outcomes.</p>
<p>2. OBE allows for expanded learning opportunities beyond traditional seat time as learning time.</p> <p>It is based on the competency-based education and mastery learning.</p>	<p>Attaining outcomes is not based on time and calendar constraints, but on the pace and ability of the learner. Achievement of outcomes is supported by flexible time frames and not bound by close, structured teaching time as in the traditional education system. Learners are encouraged to develop own insights and create own problem-solving skills.</p>
<p>3. OBE is based on successful attainment of predetermined performance outcomes.</p> <p>Educational objectives, competency-based education and mastery learning are the approaches that encompass this feature.</p>	<p>Learners are promoted through the education system when competence is demonstrated in the attainment of learning outcomes. Learners are continuously assessed and facilitated to attain the desired outcomes. Teachers should allow learners additional time to master an outcome if the competency level has not yet been achieved.</p>
<p>4. OBE is aided by instructional guidance where learners receive continuous</p>	<p>The aim of teaching is not to cover the curriculum in an allocated period (content-driven). Instead, learners discover new knowledge, skills and attitudes by</p>

<p>learning support. This feature is supported by competency-based education and mastery learning.</p>	<p>reconstructing content in a way that is understood in each learner's own context with the guidance of a creative teacher.</p>
<p>5. OBE builds on a culminating achievement of desired learning outcomes. It is based on competency-based education and mastery learning.</p>	<p>The achievement of outcomes provides the foundation for applying acquired knowledge, skills and attitudes, leading to the attainment of ultimate desired outcomes that lead to a qualification.</p>
<p>6. OBE is success-oriented and allows individual learners to achieve success according to own abilities and own pace.  This feature is based on mastery learning.</p>	<p>Learners are not graded according to pass or fail, but assessed according to competent or incompetent. It is of the utmost importance that capacity building is based on learners' own abilities, because learners progress according to their ability.</p>
<p>7. Attainment of outcomes is attained by criterion assessment.  Competency-based with roots in criterion-referenced assessment are the educational approaches for this feature.</p>	<p>The emphasis shifts from attaining the pass mark or a distinction, to a demonstration of competence at predetermined levels. Criterion-referenced assessment focuses on assessing outcomes instead of grading.</p>
<p>8. OBE is characterised by cooperative learning  (Not a main feature in mentioned approaches, but cooperative or collaborative learning is not new.)</p>	<p>Gawe in Jacobs <i>et al.</i> (2004: 209) describes cooperative learning as a teaching method where learners work together to ensure that all group members have learnt and understood the same content taught in a particular lesson. Thus individual achievement and competition are decreased and teamwork encouraged. Instead of learners working on their own, class activities such as group discussions and group projects are implemented to enrich the learning experience.</p>
<p>9. Integration of concepts across the curriculum and learning areas.</p>	<p>The focus shifts from “traditional subjects” and the mastering of content as</p>

This is a new concept. Not a main feature of the previous four educational approaches.	an end in itself to the use of content as a vehicle towards the holistic conceptual frameworks across the curriculum.
10. OBE is based on collaborative structures allowing for democratic input from the community for curriculum planning, instruction and learning. A new concept, not a main feature of the previous four educational approaches.	The OBE curriculum is open to the environment. In other words, government officials, education experts, teachers, parents and learners are involved in the development of the curriculum. Therefore the curriculum is democratised due to negotiation; it is not fixed, but changeable (i.e. a socio-constructivist approach).

(Malan, 2000: 27; Van der Horst & McDonald, 2003: 21).

In conclusion, Table 2.3 highlights the characteristics that underlie transformational OBE. These characteristics include outcomes-defined, expanded learning opportunities for learners, performance assessment, instructional guidance, a strong knowledge base, integration of concepts, success-driven, cooperative learning, criterion-referenced and collaborative structures. Besides the characteristics mentioned, it is also evident that transformational OBE corresponds with all the relevant educational approaches. Firstly, it agrees in terms of educational objectives where the curriculum is based on outcomes. Secondly, competency-based education requires learners to learn skills that would equip them for life beyond school. Thirdly, mastery learning requires that learners be given opportunities to successfully complete activities that will assist them in reaching their full potential. In the fourth place, criterion-referenced assessment assesses learners according to a set criteria, therefore learners' performances are not compared to one another. In these four educational approaches learners are seen as individuals and assessed according to their own knowledge, skills and abilities. Therefore transformational OBE strives to develop learners into becoming fully involved South African citizens who will constantly improve their own welfare and quality of life, as well as that of others in their own surroundings and in global environments.

Learners who have experienced transformational OBE are most likely to become self-directed achievers who will live and work independently. These learners will take responsibility for achieving goals based on positive values. Finally, transformational OBE develops learners' problem-solving skills that enable them to anticipate, identify and solve problems through critical thinking skills. Through problem-solving skills and critical thinking learners are empowered to make informed decisions about their lives and assist others in doing so as well (Van der Horst & McDonald, 2003: 22). Therefore the curriculum for transformational OBE is developed in a way that allows learners to develop knowledge, skills and values that can be used throughout a lifetime.

### **2.6.8 Outcomes-based education: curriculum development process**

As a starting point for the curriculum development process, the intended results of learning are focused on the development of knowledge, values and skills, rather than on the prescription of content to be learnt. This focus on outcomes encourages the development of flexible, relevant programmes of learning that is based on what learners know and can do (Lubisi, 1997: 10).

The traditional education system was previously the responsibility of a group of experts, whereas the OBE system is a cooperative, collaborative effort that includes various individuals and groups involved in education and training in South Africa. The individuals and groups include curriculum experts; officials from the national and provincial education departments; university, technikon and college lecturers; subject experts and teachers and teacher unions. In this education system representivity, expertise and direct involvement were important to the role-players who partook in developing the OBE system for South African learners. By involving a broad spectrum of individuals and groups, this would ensure that the curriculum would be relevant to all South African learners across cultures, race and gender (Van Rensburg, 1998 in Pretorius, 1998: 28).

Frameworks like the NQF and the NCS guide individuals and groups who develop learning programmes and learning materials on a national and provincial level. These guidelines enable teachers to select content and activities that are suited and relevant

to learners in a particular classroom setting. In this way all learners are exposed to good quality education and training with the emphasis on lifelong learning. In an outcomes-based approach, the content is not prescriptive but rather directed at the achievement of outcomes by learners (Van Rensburg, 1998 in Pretorius, 1998: 28). The core of OBE is constituted by the development of outcomes.

#### ***2.6.8.1 Purpose of the outcomes***

Jacobs in Jacobs *et al.*, (2004: 89) provides two meanings for an outcome. Firstly, as a statement of a desired task, skill or set of behaviours that a learner should be able to demonstrate at the end of a learning experience. This meaning has a theoretical connotation; it describes the goal a teacher wants to achieve with learners, informing learners in an idealistic way what they “should” be achieving at the end of the lesson, unit or programme. Secondly, an outcome is described as the ability to demonstrate at the end of the learning experience, a predetermined task, skill or set of behaviours in a manner that involves understanding and truthfulness. This meaning is not theoretical, but describes the practical meaning of the word and refers to the practical ability to perform a task, skill or set of behaviours. In the South African OBE system, the term outcome encompasses the acquisition of theoretical knowledge, skills values and attitudes. The Department of Education (2003b: 11) defines an outcome as a statement of an intended result of learning and teaching. It describes knowledge, skills and values that learners should acquire at the end of the FET band. Outcomes are determined at the beginning of a lesson or learning programme and indicate the knowledge, skills and attitudes the learners must achieve, whereas objectives are planned at the beginning of a lesson or learning programme and indicate the knowledge, skills and attitudes the teachers must achieve. In the traditional education system it was important that the teacher complete the syllabus, instead of the learner achieving knowledge, skills and attitudes.

An “outcomes view” suggests that teachers should pay attention to what emerges as the end of the process of education and training, rather than focusing on outputs as was the case in the traditional South African education system (Lubisi *et al.*, 1997: vii). In order to become an OBE system, the South African education system needed to be transformed.

As part of its transformation from a traditional to an OBE system, part of the traditional education terminology had to be replaced by new terms, as the terminology needed to be in line with the outcomes-based curriculum. Therefore the term “aims and objectives” referring to goals that teachers had to achieve, was replaced by “outcomes”, indicating goals that learners should achieve (Jacobs, 2004 in Jacobs *et al.*, 2004: 89).

The group of experts who developed the South African OBE system in turn set the outcomes to be achieved by the learners, now recognised as national outcomes. It is called critical cross-field outcomes, because it applies to all learners in the South African education system and is included in the NCS Grades 10-12 (General) (Department of Education, 2003a, b: 2, 8).

Spady (1994: 50) referred to these abilities as “outcomes of significance”. Spady (1994: 51) indicated that these “outcomes of significance” should embody abilities that learners would remember once particular concepts were covered by the curriculum, and gained importance in a learner's educational and career of choice. In the South African education system “outcomes of significance” are referred to as critical cross-field outcomes. The following eight critical outcomes were adopted by SAQA and the South African Government:

The learners will be able to:

- (a) Identify and solve problems, making responsible decisions using critical and creative thinking.
- (b) Work effectively with others as a member of a team, group, organisation or community.
- (c) Organise and manage oneself and one's activities responsibly and effectively.
- (d) Collect, analyse, organise and critically evaluate information.
- (e) Communicate effectively using visual, mathematical and/or language skills in oral and/or written modes.
- (f) Use science and technology effectively and critically, showing responsibility towards the environment and health of others.
- (g) Demonstrate an understanding of the world as a set of related systems by recognising that problem-solving contexts do not exist in isolation.

(SAQA Act No. 58 of 1995: 8).

The second type of outcomes is developmental outcomes. These are long-term outcomes that teachers should keep in mind when developing learning programmes (Jacobs in Jacobs *et al.*, 2004: 94). These outcomes are insights that learners should gain for full personal, social and economic development (Jacobs in Jacobs *et al.*, 2004: 106). Van der Horst & McDonald (2003: 46) state that the developmental outcomes contribute to the full potential of each learner. Jacobs in Jacobs *et al.* (2004: 106) indicate that the focus of developmental outcomes is to develop the attitudes and perceptions of learners. These developmental outcomes were accepted by the South African Government, and allow learners to develop the following skills:

1. Reflect on and explore a variety of strategies to learn more effectively.
  2. Participate as responsible citizens in the life of local, national and international communities.
  3. Be culturally and aesthetically sensitive across a range of social contexts, e.g. racial, language, religious contexts.
  4. Explore education and career opportunities to achieve full potential.
  5. Develop entrepreneurial opportunities and abilities.
- (SAQA Act No. 58 of 1995: 8-9; Van der Horst & McDonald, 2003: 47; Department of Education, 2003a, b: 2, 8; Jacobs in Jacobs *et al.*, 2004: 106).

The last type of outcome is the learning outcomes, which is subject specific. The learning outcomes for Consumer Studies will be discussed under the heading of Consumer Studies as a school subject.

The concept of outcomes implies that teachers, parents and learners are aware of the content that learners will be required to know, do and understand at the end of a learning area or learning programme, and also what teachers will work towards when teaching. Therefore outcomes should be written statements that clearly identify what learners are to learn, unlike in the traditional education system where aims and objectives of a curriculum or syllabi were not public knowledge and there was no clear indication of why a particular piece of work had to be covered. The emphasis is on the achievement of the outcomes and application of the content learnt in the classroom, rather than on merely covering the material in the classroom. Therefore

learners should be able to transfer the acquired knowledge to a variety of contexts and adapt the knowledge to a changing workplace or environment. The outcomes guide the process of teaching and learning (Van Rensburg, 1998 in Pretorius, 1998: 28-29).

The transformational outcomes-based approach to education that underlies the new South African education curriculum; aims at equipping all learners with the knowledge, competence and orientation required for success after leaving school. Therefore the guiding vision of OBE is to produce a competent South African citizen (Van Rensburg, 1998 in Pretorius, 1998: 28-29).

#### **2.6.8.2 Advantages of outcomes**

Jacobs in Jacobs *et al.* (2004: 89) discusses the advantages of outcomes. He concludes that outcomes provide a sense of purpose, motivate learners, supply teachers with practical guidelines, facilitate both communication and the assessment of learners, and help to evaluate learning programmes. The first advantage is that outcomes instil a sense of purpose in teachers and learners. When the participants in a teaching-learning situation are unaware of the goals that need to be achieved, it is easy to become distracted by trivial or less challenging activities. Outcomes enable teachers and learners to distinguish between important and less important activities, allowing participants to prioritise activities that have to be covered in the curriculum.

Secondly, outcomes arouse in learners a desire to achieve the purposes contained in the outcomes. According to Muthukrishna (1998: 139-151) in Jacobs in Jacobs *et al.* (2004: 90), research has proven that where unmotivated learners are constantly reminded of the intended outcomes to be achieved by an enthusiastic teacher; an attitude of eagerness can evolve. In this way unmotivated learners may grow in self-confidence as competencies increase.

Thirdly, an important benefit of outcomes is that it provides teachers with practical guidelines about content, teaching methods, media and methods of assessment (Jacobs in Jacobs *et al.*, 2004: 90).

Fourthly, outcomes facilitate communication between teachers, learners, parents and other interest groups (Jacobs in Jacobs *et al.*, 2004: 91).

In the fifth instance, the assessment of learning programmes centres around outcomes describing the goals that learners should achieve. The outcomes are used as the criteria upon which learners are assessed as competent or incompetent, thus assessment in the outcomes-based approach is criterion-referenced (Van Rensburg in Pretorius, 1998: 29; Jacobs in Jacobs *et al.*, 2004: 91).

The last advantage of outcomes is that it forms the basis for the evaluation of learning programmes, units or lessons. In outcomes-based education, the ends are more important than the means. If learners do not meet any of the outcomes set out in a learning programme, unit or lesson, there is undoubtedly something amiss with the learning programme. When a situation of this kind arises, evaluators of the programme, e.g. learners, teachers, parents, governing bodies and other interested parties use the outcomes as a starting point to investigate reasons for the failure of the programme in order to revamp the programme (Jacobs in Jacobs *et al.*, 2004: 91).

Van der Vyver (1998: 153) indicates that when an outcome is written, it should include assessment criteria/assessment standards that can be used as criteria that collectively provide evidence of what learners need to know, and what they should be able to demonstrate in a specific grade. Assessment standards or criteria embody broad indicators of the knowledge, skills and values learners are required to master for achieving a learning outcome (Olivier, 1998: 36; Department of Education, 2003b: 11). Assessment standards within each learning outcome collectively indicate the conceptual progression from grade to grade (Department of Education, 2003b: 11). Assessment standards or criteria are directly derived from the specific outcome and reflect a logical set of statements indicating what learners should achieve (Van Rensburg in Pretorius, 1998: 36). The NSC Grades 10-12 (General): Consumer Studies document illustrated the learning outcomes and the corresponding assessment standards for each grade. These assessment standards provided guidelines for teachers regarding the content that should be taught to learners in each grade and for the three areas of Consumer Studies, namely food and nutrition, clothing and housing and furnishings (Department of Education, 2003a: 14-35). Therefore, the Consumer Studies learning programme does not prescribe how teachers should assess each of the outcomes. Consumer Studies teachers have the freedom to choose assessment methods that would allow learners to achieve the required outcomes in each grade.

For this reason the outcomes are explicitly stated as indicated by Lubisi *et al.* (1997: 10), because the teachers and learners are given a clear indication of what is expected in the learning process pertaining to a particular phase and grade. Therefore the assessment approach is transparent to the learners and enables the teacher to negotiate aspects of assessment with learners (Van der Vyver, 1998: 36). Van der Vyver (1998: 36) also argues that the wording of the outcome, together with the assessment standards and performance indicators, constitutes the formulation of an outcome. This particular formulation makes the outcome almost completely open-ended. It allows the learner to execute the outcomes in almost any kind of context. It seeks to accommodate learners' previous experiences and contexts that are most familiar to them. This formulation of an outcome makes it easy for the teacher to determine the most appropriate teaching strategy to enable learners to acquire the necessary competencies with regard to the demands of the outcome. The assessment standards and performance indicators provide an enabling framework within which learning can take place (Van der Vyver, 1998: 36).

Outcomes are the driving force for the new South African education curriculum. Teachers are required to understand what is expected of them when planning learning activities and assessment methods to achieve the outcomes. The OBE system acknowledges the role of the teacher and learner, whereas the traditional education system only considered the role of the teacher, without acknowledging the learners' input. However, the traditional education system did have its positive aspects.

### **2.6.9 Historical perspective**

Teachers and learners were dissatisfied with the education system that was operational prior to 1994. The reason for the dissatisfaction was the inequalities in the educational standards (Pretorius, 1998: viii). This traditional education system was also referred to as the content-based approach (Olivier, 1998: 20). Despite the inequalities in educational standards, which led to disadvantages in the education system prior to 1994, the traditional education system or content-based approach to education had its advantages as well.

The advantages of the traditional South African education system can be seen as fourfold, namely improving teaching practice, evaluating teaching, motivation and directing of learning, and more focused teaching and learning.

Firstly, the traditional education system helped teachers to improve teaching practices. Tests and exams were seen as a negative form of assessment. However, there were advantages to assessing learners through tests and exams. Tests and exams assisted learners, teachers, parents and school officials in monitoring how successful or unsuccessful teaching practices were (Lubisi *et al.*, 1997: 37). Tests and exams could assist education personnel to evaluate and improve teaching practices.

Secondly, the traditional South African education system was used to evaluate teaching. Lubisi *et al.* (1997: 36) indicate that the main function of a class test or exam was to measure learner achievement, and as such it contributed to the evaluation of learner progress and attainment. Test and exams provided a form of validity and reliability to learner results, and hence it was important that teachers assigned accurate, meaningful grades to learners. These results summarised a comprehensive evaluation of learner achievement and the effectiveness of learners' efforts. Results were reported to learners and parents, and kept on record at the school to determine learner honours. They could help to create opportunities for further education and training or future employment. In the traditional system, even though learners were encouraged not to learn content by rote, learners regarded tests and exams as a means of obtaining a mark only.

Thirdly, tests and exams are used to motivate and direct learner learning. Learners are motivated to study when they are informed that a test or exam will be written. Learners are also motivated to learn for a test or exam when they are given a scope of work to be studied, and when they know that the test meets the outcomes of the learning area (Lubisi, 1997: 37). The researcher experienced that learners are more eager to study when they are aware of the test or exam and when a scope of work is provided.

Finally, traditional education practices provided teachers and learners with more focused teaching and learning. Constructing tests and exams can be a positive

experience for teachers, because it allows the teacher to plan goals for the learning area that would assist in achieving the outcomes of the specific learning area. It would allow teachers to plan tasks that learners can master to meet the goals set by the teacher (Lubisi *et al.*, 1997: 38). For the learners, tests and exams can be a rewarding experience when the teacher gives feedback about the answers to the questions, and the way in which the test was marked. This would indicate the learner's weaknesses and strengths in a particular test or exam (Lubisi *et al.*, 1997: 38).

It is clear, therefore, that the traditional form of assessment, consisting of tests and exams; did not always have negative consequences. According to Lubisi *et al.* (1997: 39) the majority of teachers were aware that tests and exams had their limitations, and were unsatisfactory for judging the achievement of various learners. At the same time they were aware of the errors made by subjective judgements based on irregular, uncontrolled observations in the classroom. On the other hand, teachers welcomed the assistance that tests and exams provided in administering a more extensive and objective basis for judgement of a learner's performance. Tests and exams are not seen as alternatives to teacher observation of learner behaviour, but simply as a specialised technique for extending, refining, efficiently recording and summarising learner observations (Lubisi *et al.*, 1997: 39).

On the opposite side of the spectrum, there are teachers who would prefer not to use tests and exams as an assessment tool. If tests and exams were abandoned, another means of assessing educational achievement would have to be put in place. Yet, no alternative that is as efficient, as dependable and as beneficial as tests and exams have yet been discovered (Lubisi *et al.*, 1997: 36). Presently, the South African education system combines continuous assessment with tests and exams.

However, the negative aspects of tests were not the only disadvantage in the traditional education system. Other problem areas were the content and focus of the curriculum, the assessment practices and the teacher-learner relationship.

In the first place, the content of curriculum in the traditional education system was too structured, prescriptive and not easily adaptable. This type of curriculum left very little room for teachers' initiative and creativity and there was no stakeholder

participation (teachers, learners, businesses and non-governmental organisations) when the curriculum was developed. In its developmental stages the focus of the curriculum was on academic education, while skills education and attitude development were neglected (Pretorius, 1998: viii). A lack of skills education has made South Africa less competitive in the international market and has distorted the growth and development of human potential (Hoppers in Hoppers *et al.*, 2000: 5).

Secondly, the focus of the curriculum was content-based and not skills-based (Hoppers in Hoppers *et al.*, 2000: 5). The traditional curriculum was based on an understanding of what educational processes tried to achieve, and therefore had a certain form of assessment to correspond with that particular understanding of the teaching and learning process. According to the traditional understanding of the teaching and learning process, there was a certain body of knowledge in each subject area that a learner had to memorise.

The content of the subjects in the traditional education system was divided up into what had to be learnt and the amount of content to be learnt. Learners were required to memorise the content required for a particular grade. Therefore it was learners' memories, their capacity to memorise and the skill of recalling memorised facts that were developed in this traditional education system (Le Grange & Reddy, 1998: 4). This system was not interested in developing the learner in a holistic manner, which would include acquiring knowledge, skills and attitudes. Olivier (1998: 46) identified that certain skills were lacking in learners who had come through the content-based approach to education. Learners were unable to transfer knowledge and skills to real-life situations, because learners were not taught how to apply knowledge but had to learn the knowledge by heart. Three main terms were used to describe these traditional assessment practices, namely, formative, summative and norm-referenced.

Formative assessment takes place throughout the learning process. In this type of assessment, the teacher either provides individual learners with feedback, or writes comments on the work that learners have handed in. The teacher sets a number of tests during the year, in addition to the end-of-year examination, to facilitate authentic learning (Le Grange & Reddy, 1998: 4-5). In the traditional education system the focus of the formative assessment was on the tests, with very little focus on other

forms of assessment such as projects, portfolios and written assignments. Formative assessment is used in outcomes-based assessment with the focus not only on developing knowledge, but also skills and attitudes. Therefore the focus is not on the tests only; various forms of assessment are used to develop the learners' knowledge, skills and attitudes.

The second type of assessment used in traditional education was summative assessment. This took place at the end of the learning experience for a purpose outside the learning experience. It was made up of an examination at the end of each term. The aim of the summative assessment was to determine how much of the subject content the learners could memorise and recall on paper. This examination did not provide the learner with information about the progress of the learning process (Le Grange and Reddy, 1998: 4). The examination did not identify the skills, attitudes and values that the learner had acquired throughout the school year.

The third type of assessment is norm-referencing. Summative assessment is usually norm-referenced. In this form of assessment learners' results are compared to those of other learners or with "pass marks" that determine how 'well' the learner had performed (Le Grange & Reddy, 1998: 4). This was the aim of summative assessment in the traditional South African education system that was focused on memorising content and recalling factual information.

These three types of assessment practices were prevalent in the traditional South African education system. The focus was teacher-centred, rather than learner-centred. Thus assessment practises had a short-term focus and there was very little opportunity to unlock the learners' potential. At the same time, very little emphasis was placed on critical thinking or valuing the input of the learner (Vandeyar & Killen in Fraser *et al.*, 2003: 122).

Olivier (1998: 46) identified the skills that were lacking in learners who had passed through the content-based or traditional South African system. Learners were not successful in transferring knowledge and skills to real-life situations. Likewise, they could not draw on processes for employing knowledge and skills to achieve outcomes. The ability to identify and solve problems by applying creative and critical

thinking was not nurtured in the traditional South African education system. Learners were not taught how to organise and manage themselves and their activities responsibly and effectively, or to work effectively in a team, group, organisation or community. They were not sufficiently trained in how to collect, analyse, organise and critically evaluate information. Learners could not effectively and critically use science and technology to demonstrate their responsibility towards the environment and the health of others. They did not understand how the world operated as a set of related systems, which was an indication that problem-solving techniques had not been part of the traditional South African education system. The lack of these skills is now being addressed in OBE and documented as critical cross-field outcomes.

Van der Horst & McDonald (2003: 27) summarised the learning content of the content-oriented or traditional South African education system, as dominated by the textbook from which the syllabus was taught. This syllabus was seen as rigid and non-negotiable by the education authorities. The material in the textbooks was graded from easy to difficult, which represented a strict and inflexible grading of the content. This grading of the material differentiated between higher and standard grade content. The content in the syllabus was not open to public scrutiny. A positive aspect of the content-oriented textbook was the illustrations that complemented the content in the textbook, thereby making the content clearer and promoting insight.

Another disadvantage, as identified by Van der Horst & McDonald (1997: 27-28), was the relationship between the teacher and the learners. Teachers saw learners as “empty vessels”, so that the teachers were responsible for the type of content taught and the time frames in which the content was taught. The motivation of the learners to learn the content was dependent upon the teacher's personality. When teachers assessed the learners' work, a memorandum was directly set up from the textbook, which meant that the memorandum was rigid, leaving very little room for flexibility or creativity. Learners were given comprehensive content to gain insight into underlying processes and principles. However, the focus was on the content and not on how to go about researching the information for the content. The application of the content to real-life situations was not practised in the content-oriented curriculum. The content of the traditional South African education system was assessed by means of the revision of facts through tests and exams.

Van der Horst & McDonald (2003: 27) summarised the assessment used in the content-oriented curriculum and indicated that since the learning material was content-based, the assessment practices would also be content-based. The content of the traditional education system was assessed in isolation, which means that the various aspects of the subject being assessed were not seen as a whole. Each topic was assessed individually. Assessment activities were regarded as being separate from the instructional process. All that was assessed, was knowledge learnt by rote. Assessment methods were one-off opportunities, such as tests and exams. Continuous assessment was not an option in the content-oriented curriculum.

Even though the traditional South African education system had many negative aspects, the acquisition of content must not be overlooked. Without a sound foundation in the content of a subject, no higher-order thinking skills or problem-solving skills can be applied. All learners need to acquire a sound content or knowledge base in order to develop skills in applying the content in other contexts. A curriculum without a strong content base has little to offer learners (Van der Horst and McDonald, 2003: 29). However, it needs to be presented in a holistic approach as promulgated by OBE in the post-1994 South African education system which used outcomes as an approach to develop learners holistically.

Each learning outcome in Grades 10-12 has appropriate assessment standards. The Department of Education (2003b: 11) defines assessment standards as criteria that provide evidence of the theoretical knowledge and demonstration of a skill at a specific grade. These assessment standards entail the knowledge, skills and values required to achieve the learning outcomes in each grade. A learning outcome and an assessment standard differentiate between describing what learners should know and do (the learning outcome) and describing the minimum level, depth and breadth of what has to be learnt in a particular grade (the assessment standard) (Van der Horst & McDonald, 2003: 47; Jacobs in Jacobs *et al.*, 2004: 106). Therefore assessment standards within each learning outcome collectively indicate a theoretical progression from grade to grade (Department of Education, 2003b: 11). The knowledge, skills and values would increase in complexity as the learners progress from grade to grade.

A learning programme specifies the scope of content and assessment for the three grades in the FET band (Department of Education, 2003b: 12). This learning programme provides a detailed list of all topics and assessment methods that should be covered in each subject in the FET band (Jacobs in Jacobs *et al.*, 2004: 67). These learning programmes ensure that learners achieve the learning outcomes prescribed by the assessment standards for a particular grade. Learning programme guidelines should be read in conjunction with the assessment guidelines and the NCS (Department of Education, 2003b: 12).

When the traditional South African education system is compared to the outcomes-based system, it becomes clear that learning programmes have replaced the syllabus in the outcomes-based education system. The first difference between the learning programme and the syllabus is that the syllabus focused only on the development of a learner's knowledge, which was designed by the National Education Department without the input of teachers. The learning programme is focused on the holistic development of the learner, encompassing knowledge, skills and values, and is designed with the assistance of the teachers. Secondly, the syllabus is focused on the learning content, while the learning programme includes content, teaching-learning activities and assessment methods. Lastly, the syllabus was focused on objectives to be achieved by the teachers, whereas the learning programme focuses on the achievement of outcomes by learners (Jacobs in Jacobs *et al.*, 2004: 67). The learning programme of Consumer Studies will be the focus for this research, because the subject Consumer Studies falls under this learning programme. The achievement of outcomes by learners influenced the method used to assess the learning of learners.

#### **2.6.10 Assessment in outcomes-based education**

The assessment of learning is an important element in OBE. Killen (2000: 17-18) indicates that the principles of OBE by Spady (1994: 10), namely clarity of focus, designing back, high expectations and expanded opportunity, are linked to the assessment practices in OBE. The first principle, clarity of focus, implies that all assessment tasks in outcomes-based education should be linked to clearly defined and long-term outcomes that learners are required to achieve in a programme, lesson or unit (Killen, 2000: 17; Vandeyar & Killen in Fraser, *et al.*, 2003: 123). These links are

important if the assessment is to be used as evidence to provide valid deductions about learners' achievements. If fairness in assessment is practised, teachers will not assess learners on work that has not been taught (Vandeyar & Killen in Fraser *et al.*, 2003: 123).

The second principle, designing back, is linked to assessment in that the specific outcomes of a programme, as well as the exit level outcomes, must be assessed by the teacher and the relevant content included in the curriculum to ensure that these outcomes have been achieved (Killen, 2000: 17). Killen (2000: 17) and Vandeyar & Killen (in Fraser *et al.*, 2003: 123) state that it is not only the learning outcomes of a programme that must be assessed, but also the exit level outcomes that are set up for the duration of a programme. Therefore it is the responsibility of the teacher to ensure that he/she assesses the learning outcomes as well as the exit level outcomes. It cannot be assumed that the learning programme will assist learners to achieve the exit level outcomes.

There must be evidence that the teacher had indeed assisted learners to achieve these exit level outcomes (Killen, 2000: 17). When the design-back principle is applied to assessment, it requires that the teacher describe the purpose of each assessment task in terms of (a) how the assessment task provides information about learners' current understanding of a particular concept or unit, (b) how the assessment task provides information about learners' abilities to continue to the next step or level and (c) how the assessment task provides information about learners' progress towards achieving the exit level outcomes of a programme. It is important that the teacher should identify when learners are competent to proceed to the next level of learning – this cannot be done without valid and reliable methods of assessment (Killen, 2000: 17; Vandeyar & Killen in Fraser *et al.*, 2003: 123-124). When the achievement of the exit level outcomes are important in a particular programme, as is the case in the South African education system, then the predictive validity of the various assessment tasks in a programme is very important for the achievement of learning outcomes and exit level outcomes (Killen, 2000: 17).

To achieve reliability, teachers need to know if the achievement of outcomes is an accurate indicator of learners' progress toward the achievement of exit level outcomes

in a programme. This means that assessment tasks must be authentic and set up in such a way that the outcomes as set out in the curriculum will be achieved. Assessment in a real context has greater predictive validity for exit level outcomes that aim to equip learners with life skills that will take learners through life than does assessment in non-authentic ways, such as paper and pencil tests (Killen, 2000: 17-18).

The third principle, that of high expectations, implies that if learners are given appropriate opportunities, all of them can achieve high standards. If learners are to achieve high standards, teachers must plan challenging and not routine forms of assessment. These forms of assessment should allow opportunities for learners to demonstrate deep levels of understanding and high levels of achievement. With the construction of assessment tasks, one must be able to differentiate between low and high levels of achievement, while excellence in learner achievement must be recognized and rewarded (Killen, 2000: 18).

This principle can only be implemented if the teacher is able to clearly define a variation of possible levels of understanding with regard to the concepts being taught (Killen, 2000: 18; Vandeyar & Killen in Fraser *et al.*, 2003: 124). This implies that the teacher should use Bloom's taxonomy of knowledge, skills and attitudes to implement various levels of assessment tasks for accommodating learners of varying levels of competency.

For the high expectations principle, criterion-referenced assessment is preferred to norm-referenced assessment (Vandeyar & Killen in Fraser *et al.*, 2003: 124). The reason for applying criterion-referenced assessment in outcomes-based assessment is that learners are assessed according to a well-defined list of criteria and not against other learners' standards of performance. Criterion-referenced assessment is linked to fairness in testing, because in this type of assessment; the criteria must be made known to learners before an assessment task can be attempted. If the criteria are made transparent to learners, it decreases errors made by learners and increases the reliability of the assessment tasks (Vandeyar & Killen in Fraser *et al.*, 2003: 124).

The last principle of Spady (1994: 12) linked to assessment is expanded opportunity. This entails that all learners can be successful if given adequate opportunities and time to learn, and to demonstrate learning (Killen, 2000: 18; Vandeyar & Killen in Fraser *et al.*, 2003: 124). As not all learners will gain a high level of understanding about a new concept at the first attempt, the teacher should provide further opportunities for learners to understand new concepts (Vandeyar & Killen in Fraser *et al.*, 2003: 124). This implies that in OBE it is important that learners are successful in the learning process, and not that learning takes place in a particular manner or within a fixed period of time (Vandeyar & Killen in Fraser *et al.*, 2003: 124).

It is imperative that teachers work toward the constraints set by the DoE, like the submission of learners' results by a set date and adhering to a time span for completing a curriculum, but teachers should attempt to adapt teaching strategies to the needs of the learners (Killen, 2000: 18; Vandeyar & Killen in Fraser *et al.*, 2003: 124). It is not appropriate that teachers expect learners to fit into a teacher's or the DoE's preference of teaching and assessment methods. To implement this principle, teachers should reflect on traditional assessment methods such as paper and pencil tests, and investigate alternative methods of assessment (Vandeyar & Killen in Fraser *et al.*, 2003: 124).

This principle of expanded opportunity is linked to fairness in assessment, because it is unfair to expect that all learners are ready to be assessed simultaneously and to judge learners' achievements if insufficient opportunities were provided to demonstrate the knowledge, skills and abilities that were learnt by the learners (Vandeyar & Killen in Fraser *et al.*, 2003: 124). This principle cannot be implemented if teachers do not adopt a flexible approach to assessment in the classroom (Killen, 2000: 18).

Vandeyar & Killen (in Fraser *et al.*, 2003: 124) discuss the relationship between the principles of assessment and the principles of OBE. The findings based on the work of Killen (2000: 18), are summarised below. Van der Horst & McDonald (2003: 210) pose questions to readers, addressing factors that should be considered to make the process of assessing learning outcomes more effective. The researcher linked the questions to the summary of the principles of assessment as summarised below.

1. Does the assessment focus on what is important, what is of value, and what learners will require for succeeding in the future? Assessment methods should focus on the outcomes that are to be evaluated, so that valid conclusions can be drawn about the learning that has taken place.
2. Does the assessment process provide the teacher with sufficient information about the effectiveness of his/her teaching? Assessment methods used by teachers should be reliable. Teachers should make a conscious effort to minimise errors when using various assessment methods. Learners should be allowed to demonstrate their understanding of content at appropriate times. The assessment methods used at each assessment opportunity should always produce consistent results.
3. Assessment methods should be fair in that assessment criteria should always be transparent to learners. Learners should always be given the opportunity to demonstrate their understanding of the content, irrespective of external factors such as learners' cultural background or socio-economic status.
4. Does the assessment process serve learners by providing them with useful information that will make a meaningful difference to them? Assessment should reflect the knowledge and skills that are important for learners to achieve. The same knowledge and skills should be reflected in the outcomes of a learning programme.
5. Are learners' results used fairly, meaningfully and in a manner that empowers the learners? Assessment in outcomes-based education should challenge the learners' level of understanding and their ability to apply knowledge in various contexts. This type of assessment will identify competent and incompetent learners.
6. Does the assessment process incorporate multiple strategies that encourage learners to demonstrate learning outcomes through a variety of acceptable means? Assessment tasks should be authentic and meaningful, so that learners at varying degrees of competence are given an opportunity and the support to learn. Each learner is an individual and assessment methods should allow learners to demonstrate this individuality.

It is clear that the characteristics of transformational OBE are aligned with the principles of assessment.

When OBE was introduced to South Africa in 1995, the most notable change was to the assessment practices of the country's education system. There was a shift from memorising a fixed body of knowledge to a set of outcomes that had to be demonstrated, so that learners could be deemed competent in a particular area of work. In this outcomes-based approach, there was a strong focus on the application of knowledge in real-life contexts (Vandeyar & Killen in Fraser *et al.*, 2003: 125). However, without valid and reliable assessment practices, teachers are not only unable to see if the outcomes set out in a programme, lesson or unit have been achieved by the learners, but also unable to determine the shortcomings in their teaching practice. Assessment procedures need to have reliability and validity to demonstrate the rate and extent of progress achieved by each learner.

In OBE the assessment is planned before the teacher embarks on teaching a particular lesson or topic, because the assessment methods form an integral part of the planning and preparation. The assessment in OBE is mainly formative in nature; it means that learners' knowledge, skills and values are shaped throughout the learning process (Van der Horst & McDonald, 2003: 166). With the outcomes-based approach the assessment procedures provide a clear indication of the content that learners have to master. These assessment procedures must be flexible and equitable. Assessment procedures should be designed exclusively to match the learning outcomes that learners are to achieve. The more realistic the assessment practices, the more clarity learners will have about what should be learnt in a programme, lesson or unit (Van der Horst & McDonald, 2003: 166).

Jacobs (in Jacobs *et al.*, 2004: 75) states that assessment should not be seen as an isolated, secretive procedure that takes place only at the end of a term or year. It should be a transparent and on-going process that is ingrained in the teaching-learning process. Therefore learners should be assessed on a regular basis according to the assessment programme based on national assessment guidelines. For the purpose of this study the focus of the assessment practices will be on the FET phase of the NQF band and based on Consumer Studies, as this school subject is taught in Grades 10-12 only. The national assessment guidelines for Consumer Studies are found in the NCS Grades 10-12 (General): Consumer Studies.

Assessment should be integrated with teaching and learning and should be cross-disciplinary in nature, enabling teachers to assess learners on content across the various learning areas in the South African education system. Another aspect of integration is the concept of integrated assessment in OBE that refers to assessing more than one outcome simultaneously in a single assessment task (Sierbörger and Macintosh, 2004: 38). Competence in outcomes can be demonstrated in a variety of ways. Therefore teachers should provide learners with multiple opportunities to master new concepts that are being taught. In OBE the concept of re-assessment was introduced to ensure that learners would be competent in the knowledge and skills taught in a programme, lesson or unit (Vandeyar & Killen in Fraser *et al.*, 2003: 125).

Teachers should always maintain accurate records of learners' results and use assessment codes 'competent' or 'not competent', as prescribed by the South African National Education Department. When learners have achieved the outcomes as set out in a programme, lesson or unit, it is evident that the learners had participated in his or her own development (Olivier, 1998: 21). However, if learners do not achieve a specified outcome after undergoing the necessary learning processes to master a concept in a programme, lesson or unit; the teaching methods or learning activities have to be reconsidered and adapted to assist learners in achieving the required outcome. This implies that a variety of teaching methods and learning activities have to be used so that learners can successfully achieve the outcomes of a programme, lesson or unit (Le Grange & Reddy, 1998: 9). Learner portfolios contain evidence that illustrate an overview of learners' progress and must be updated regularly by teachers and learners to monitor learner progress. It is imperative that teachers inform parents and learners on a quarterly basis about learning achievements. It is of the utmost importance that teachers and learners realise that assessment should emphasise the growth and development of learners (Department of Education, 2002b: 54-60 in Jacobs in Jacobs *et al.*, 2004: 75). Teachers should use the feedback obtained from the assessment of outcomes to reflect on and improve learning programmes (Sierbörger & Macintosh, 2004: 38).

It is clear that the purpose of assessment is not merely to determine a learner's worth. It is the basis for determining not only the content that should follow on the work that has been assessed, but also the next level to be set as an objective for learners.

Assessment is useful as a remedial tool, or as a basis for making decisions about the retention or promotion of learners. Assessment is affiliated to effective teaching (Van der Horst & McDonald, 2003: 210).

In OBE, assessment should always contribute to the goal of improving learners' learning. This can be achieved by the teachers planning and executing different forms of assessment activities so that learners can demonstrate knowledge, skills and attitudes to their own contexts. Beside teachers and learners taking responsibility for learning and assessment, the DoE should also assume responsibility. This responsibility is assumed in the compilation of both a learner and teacher portfolio.

## **2.7 THE TEACHING PORFOLIO AS AN ASSESSMENT TOOL**

### **2.7.1 Introduction**

Wyatt & Looper (2004: 2) point out that the portfolio is not a new concept. Artists have compiled portfolios for years, using it to obtain commissions, or to demonstrate their best work. Financial portfolios contain a detailed record of monetary transactions and investment holdings that depict an individual's economic worth. Portfolios have been used to demonstrate best practices, to showcase excellent lessons, learner products and assessment, to show compliance with teacher certification, and for personal growth and reflection (Barrett, 2004: 1; Wyatt & Looper, 2004: 2; Stansberry & Kymes, 2007: 1). Irrespective of the type of portfolio, the compiler must be able to explain the choice of its content and the method of presentation of the portfolio (Wyatt & Looper, 2004: 2).

Barrett (2004: 1) mentions that by contrast; an educational portfolio contains work selected by a learner, that is evident of the learner's growth and change that has been taking place over a period of time. Therefore an important aspect of the educational portfolio is the reflection on the individual pieces of work (called artifacts) that have been placed in the portfolio by an individual, and the reflection on the story told by the portfolio. These features of the educational portfolio also apply to the teaching portfolio. The difference between a portfolio compiled by a learner and one compiled by a teacher is that the teacher keeps all the assessment items completed by the

learner in a given subject. Therefore the term portfolio is always preceded by an adjective describing its purpose (Barrett, 2004: 1). For the purpose of this study the teaching portfolio will be used.

In the education fraternity, the portfolio has become an assessment tool for the compiler, either for promotion, job retention or permanent status, or for an indication of growth or potential growth. The compiler in this study is the teacher. Therefore the items chosen by the teacher for the teaching portfolio must hold value to the teacher and to the portfolio's audience. This means that the items selected for the portfolio requires careful reflection by the teacher, in that the teacher must justify the purpose of each chosen item. If there is no reflection, it is merely a collection of artifacts without form or purpose. Thus the real factor for assessment is reflection. Reflection is an excellent tool to allow individuals to display work in an effective manner. The teaching portfolio indicates that the teacher has reached a certain level in his or her professional career (Wyatt & Looper, 2004: 2-7).

### **2.7.2 Defining a teaching portfolio**

Seldin (1993: 2), a pioneer in teaching portfolio research, defined the portfolio as “a factual description of a teacher's major strengths and teaching achievements. The teaching portfolio described documents and materials, which collectively suggest the scope and quality of a teacher's teaching performance”. Similarly, Darling (2001: 111); Painter (2001: 31); Campbell & Brummet (2002: 28); and Xu (2004: 199) defined the teaching portfolio as a personalised portrait of a teacher's role as an individual, a professional and the reflection upon his or her teaching philosophy and practice indicating insight into the teacher's growth. Therefore the teaching portfolio is not a random accumulation of artifacts, but thoughtfully chosen information about teaching activities supported by evidence to portray its effectiveness (Seldin, 2000: 2; Darling, 2001: 111; Painter, 2001: 31). Campbell & Brummet (2002: 26) propose that a teaching portfolio should be designed as a structured history to document the teacher's thought processes and understanding of issues and ideas, supported by samples of teacher's work and reflective thinking. Therefore the evidence in a teaching portfolio must be selective, reflective and collaborative (Xu, 2004: 199). The teaching portfolio

is an unfolding of the teacher's understanding of teaching, learning and development as a professional (Darling, 2001: 111).

The South African definition of a teaching portfolio takes on a slightly different meaning. For this study the Consumer Studies teaching portfolio was a file that contained all the instructions, assessment criteria and rubrics pertaining to all the CASS tasks set for the learners (Western Cape Education Department, 2001: 8). The Consumer Studies teaching portfolio did not allow teachers to reflect about the teaching and assessment activities carried out in the classroom, or activities that learners were required to complete.

The teaching portfolio assured the quality of the assessment tasks given to the learners and provided a record against which learner portfolios could be moderated. A teacher should keep a record of all the assessment tasks to monitor learners' progress, as well as that of the teacher him- or herself. The assessment tasks would assist the teacher to plan for future lessons. The portfolio should be available on request at all times (Department of Education, 2005b: 17-18). The teacher's portfolio should include an assessment plan for the grade taught, a copy of the instructions for each assessment task, assessment instruments for each task, e.g. marking grids, rubrics, assessment criteria and marking memoranda, as well as a record of the learners' progress (Western Cape Education Department, 2001: 18).

### **2.7.3 Content of a teaching portfolio**

When selecting artifacts for a portfolio, the compiler needs to determine a clear understanding of the intention of the teaching portfolio. The teaching portfolio can have various functions. It can be used as an assessment tool (educational portfolio), to document personal growth (developmental portfolio) or to display best pieces of work (showcase portfolio) (Wyatt & Looper, 2004). The type of portfolio being compiled will influence the type of content and organisation of the portfolio (Wyatt and Looper, 2004: 42). The audience or readers should also be considered when compiling the portfolio (Mues & Sorcinelli, 2000: 4). In this study teachers at various secondary schools of the WCED compiled an educational portfolio that is referred to as a teaching portfolio in the South African context.

Wyatt & Looper (2004: 43) state, “A portfolio collection should be purposeful, selective, diverse, ongoing, reflective and collaborative”. The portfolio should include a variety of well-selected items of teacher and learner work that illustrate learning outcomes and assessment standards. To make a teaching portfolio meaningful, the learning outcomes, assessment standards, captions and written commentary should accompany each portfolio artifact, explaining the content, so that the reader understands the reason for its inclusion and the complex thinking behind the teaching process. By linking theory and practice sound instruction methods are enhanced and provision for planned professional reflection and growth is determined. Self-reflection is crucial for promotion or tenure rather than for teacher improvement.” (Wyatt and Looper, 2004: 43-44.)

There is no exact, prescribed list of items that should be included in a teaching portfolio. Various researchers suggest a list of items that should be included in the teaching portfolio. Two views will be discussed: that of Seldin (2000) and Mues & Sorcinelli (2000). Firstly, the views of Mues & Sorcinelli (2000) will be discussed. The listed items below are typical of most portfolios.

**(i) Teaching philosophy and goals.** This is the foundation of the teaching portfolio. The teaching philosophy is a personal statement that provides insight into the belief about the purpose of education, and teachers have to document why they do what they do as a teacher. This question has four components: Firstly, it refers to a teacher's beliefs about how student learning takes place. Secondly, the teacher should reflect on the beliefs about how a teacher can best assist learners to learn. The third section is about practically putting beliefs into effective teaching and learning, while the fourth section documents goals for learners. Reflecting on one's teaching practice serves as a good basis for self-assessment and personal growth (Mues & Sorcinelli, 2000: 5-6).

**(ii) Teaching experience and responsibilities.** In this section the teacher must provide a statement of teaching roles and responsibilities undertaken as curricular and extra-curricular activities, and also summarise subjects presently being taught and those taught in the past (Mues & Sorcinelli, 2000: 5).

(iii) **Teaching methods and strategies.** Teachers have to describe how teaching takes place in their classroom. This includes teaching methods, types of media used in the classroom, learner activities and learning content (Jacobs et al., 2004: 175; Mues & Sorcinelli, 2000: 6). In the description of teaching methods and strategies, the teacher should state how it relates to the teaching philosophy (Seldin, 2000: 3; Mues & Sorcinelli, 2000: 6). A description of effective teaching practices should be described as well, and this should be supported by evidence to illustrate one's teaching approach. The evidence to be included could be from the teacher him- or herself, and from heads of department, colleagues and learners (Mues & Sorcinelli, 2000: 6).

(iv) **Activities undertaken to improve teaching.** Discussions and evidence in previous sections would allow the teacher to reflect upon success and failures and how to improve on the failures, which again serves to improve the effectiveness as a teacher. The evidence kept in the portfolio could make the teacher aware of any flaws in the teaching and learning process, which could lead to the teacher experimenting with new teaching strategies in the classroom. In this section a teacher can document descriptions of revised assignments or a subject, and the reasons for its revision (Mues & Sorcinelli, 2000: 6-7).

(v) **Goals and plans for the future.** In this section the teacher should state the goals to improve teaching practice and methods used to accomplish these goals (Mues & Sorcinelli, 2000: 7).

(vi) **Representative course material.** A teacher should include evidence of syllabi taught, assignments completed by learners, exams, graded and ungraded, handouts to learners, case studies, subject outlines, descriptions and examples of visual aids used in the classroom and descriptions of technology used in the classroom, for example computers (Mues & Sorcinelli, 2000: 7).

(vii) **Assessment and extent of learner learning.** The teacher should include marks of standardised tests or other tests before and after instruction, samples of learners' work such as written papers, essays, laboratory books, workbooks, presentations or other creative work, such as practical projects. Teachers should include marked exam scripts that range from the highest to the lowest grade and

provide explanations for the method of grading. Feedback on learners' work should be included. Information from the teacher, colleagues or parents that addresses the preparation of learners for advanced work and the effect on learners' career choices and employment should be included in this section (Mues & Sorcinelli, 2000: 7).

**(viii) Descriptions and evaluations of teaching.** In this section of the teaching portfolio the teacher should have evidence of summarised evaluations of teaching by learners, including response rates, learners' written comments and overall ratings. Results of interviews conducted with learners who have completed the year with a particular teacher, letters from the principal, present and past learners and a videotape of the teacher teaching in the classroom should be evident, as well as a letter from the departmental head describing the teacher's teaching performance.

Peer evaluation of teachers should take place and be placed in the portfolio. The evidence should include statements from colleagues about a teacher's mastery and selection of content, suitability of outcomes with assessment criteria of subject area, suitability of teaching strategies to achieve the outcomes and assessment standards and suitability of textbook material to achieve outcomes and assessment standards.

The teacher must display evidence of commitment toward learner learning, a commitment toward the support of departmental instructional efforts and the willingness to work with colleagues on instructional materials. Teachers must display the ability to teach skills that learners can apply to daily academic life such as writing skills and critical thinking (Mues & Sorcinelli, 2000: 12).

**(ix) Activities to improve a teacher and colleagues' instruction.** In this section of the teaching portfolio evidence about colleagues' observation of the teacher's classes, as well as evidence of serving as a team or guest teacher, participation in seminars or professional meetings about teaching and conducting classroom research projects should be included. Teachers should include evidence of new methods of teaching, assessing, learning and grading that are used in his/her teaching practice and methods of innovative audiovisual materials, computers or other technology. Teachers should display evidence of assisting colleagues with effective instructional methods by conducting seminars or facilitating workshops and mentoring teachers or teacher

assistants in the teaching practice. Teachers could insert evidence of authoring a textbook or software in a particular course (Mues & Sorcinelli, 2000: 12-13).

(x) **Contributions to institutions or profession.** In this section of the teaching portfolio teachers should display evidence of participation in local, provincial and national activities or organisations that are related to teaching and learning and participation in school-tertiary institution partnerships that promote and improve learning across all educational sectors, i.e. both at school and tertiary level. Development of a learner assistantship or internship including arrangement and supervision of internships and publications in educational journals should be evident (Mues & Sorcinelli, 2000: 13).

(xi) **Honours and recognitions.** These entail awards received for teaching from the profession; education department, school or tertiary institution where studies were undertaken. Invitations to consult, including requests for advice about teaching by education committees or related groups should be placed in the teaching portfolios. Invitations to conduct workshops and produce articles based on one's teaching profession should be evident in the teaching portfolio (Mues & Sorcinelli, 2000: 13).

Seldin (1993: 6-7), a pioneer in teaching portfolios, provides a second view of the content that should be included in a teaching portfolio. Seldin (1993: 7-8) suggests that the content of the teaching portfolio can be divided into three sections, namely materials from oneself, materials from others, and products of good teaching. These three sections contain commonly selected items that appear in a teaching portfolio. A fourth section, mentioning items that sometimes appear in portfolios, includes additional items that could be kept in a teaching portfolio (Seldin, 1993: 8). Unlike Mues & Sorcinelli (2000: 11-13), Seldin (1993: 7-8) does not provide a brief description for each of the items suggested, but indicates the types of evidence to be included in the teaching portfolio.

(i) **Materials from oneself**

Under the heading of material for oneself, follows a statement of teaching responsibilities, including course titles, number of learners enrolled and the number

sitting in the classroom, and a brief description of the method a teacher uses to teach a particular subject.

Evidence of examples of course syllabi detailing learning outcomes and assessment standards, course content, teaching methods, readings and formative activities should be present in the teaching portfolio (Seldin, 1993: 7; Seldin, 2000: 2).

Descriptions of interventions taken to improve teaching practice, including changes executed after self-evaluation has been conducted and the teacher has read journals about how teaching improvement can take place and participation in training programs on sharpening instructional skills (Seldin, 1993: 7; Seldin, 2000: 2–3).

The inclusion of innovative teaching strategies and evaluation of its effectiveness should be placed in the teaching portfolio. A personal statement describing the teaching goals of a teacher for the subsequent five years should appear in the teaching portfolio (Seldin, 1993: 7; Seldin, 2000: 2).

**(ii) Materials from others**

Evidence of learner evaluation data of a particular subject that suggests an overall rating of effectiveness or suggests improvements must be evident in the teaching portfolio. Evidence of statements from colleagues who observed the teacher in the classroom and statements from colleagues who have reviewed the teacher's teaching materials, such as course syllabi, assignments, testing and marking practices should be included. Rewards of recognition such as distinguished teaching awards should be placed in the teaching portfolio to indicate a teacher's awards for excellence (Seldin, 1993: 8; Seldin, 2000: 3).

**(iii) Products of good teaching**

In this section of the teaching portfolio a record of learners who succeed in advanced fields of study in a particular field and student publications or conference presentations on course-related work should be included. Testimonials from employers or students about a teacher's influence on career choice or plans and students' results on pre- and post-course examinations should be placed in the

teaching portfolio (Seldin, 1993: 8; Seldin, 2000: 2). This list of items applies to teachers at tertiary institutions and not to teachers at a school.

**(iv) Items that sometimes appear in teaching portfolios**

Items that could be included in the portfolio would depend upon the purpose of the portfolio and the discipline or institution for which the teaching portfolio is compiled. Additional items to be filed in the teaching portfolio could serve as descriptions of curricular revisions that include new course projects or assessment activities, course materials and class assignments.

Self-evaluation of teaching-related activities such as teaching strategies and assessment materials, as well as descriptions of how technology such as computers, film and other non-print materials are used in teaching could be placed in the teaching portfolio. A teacher's contribution to or the editing of a professional journal, or an invitation to present a paper at a conference about teaching in a particular discipline deserves a place in the teaching portfolio.

A statement from the head of department that assesses the teacher's teaching contribution to the department in which the teacher is employed, statements by alumni about the quality of the teacher's quality of instruction and a videotape of the teacher's teaching in the classroom would make a valid contribution to the teaching portfolio. Evidence of assistance given to colleagues to improve teaching practices, participation of off-campus activities related to teaching activities in the teacher's discipline and examples of marked students' assignments along with the teacher's comments and reasons for the grading of the assignments could also be placed in the teaching portfolio (Seldin, 1993: 8-9).

Darling (2001) conducted research on thirty-one education students that had to document the learning that took place through the development of a portfolio. The instructors requested students to present the following four components in the portfolio. Firstly, an introduction that explained the nature, type of selection and reasons for selecting the items included in the teaching portfolio had to be provided. Secondly, a teaching philosophy was to be included, and thirdly, an example of teaching practice related to each of the school subjects, e.g. lesson plans, resource

files and assessment activities. A fourth requirement was an action plan for teaching that would include explanation and/or illustrations of classroom organization and governance, curricula goals, instructional methods and plans for professional development (Darling, 2001: 111).

There are no specifications concerning the amount of evidence to be included in a teaching portfolio. Seldin (1993: 9) suggests that an overkill of information in the teaching portfolio should be avoided. Campbell & Brummet (2002: 28) reiterate Seldin's idea (1993: 7), because the number of items would be dependent upon the purpose and the reader of the teaching portfolio. A teaching portfolio is a living document and has to be updated regularly. With regular updates new items are added and others are removed (Seldin, 1993: 9). The updating of items in the teaching portfolio will relate to the purpose at hand, whether it is for professional development, job promotion or licensure.

#### **2.7.4 Benefits of a teaching portfolio**

Seldin (2000: 4), a pioneer in the field of teaching portfolios, states: "...the primary purpose of teaching portfolios is to improve teaching performance". According to Delandshere & Arens (2003: 61); Campell & Brummet (2002: 27) and Mues & Sorcinelli (2000: 1), the teaching portfolio has two purposes. Firstly it serves as a developmental process that requires an teacher to reflect and improve his/her teaching practice, and secondly as an assessment product for personnel and professional development, such as permanent status, promotion or a teaching award. Delandshere & Arens (2003: 61) and Zeichner & Wray (2001: 615) also emphasize that a teaching portfolio is used to assist student teachers to engage with and to document the growth in their teaching practice, while complementing the professional development of qualified teachers.

Xu (2003: 347) conducted research about teaching portfolios at the Avery elementary school in the United States of America. The educators used the teaching portfolio to promote their personal professional development, using the opportunity to reflect on teaching practices and to engage in conversation with colleagues in the school

community. Moreover, Xu's (2003: 352) study revealed that the teaching portfolio also had various benefits for the respondents who participated in this study.

The benefits of the teaching portfolio that were highlighted by this study included the fact that (i) it allowed teachers at various stages of their careers to reflect on their teaching practice, e.g. a first grade teacher in the second year of teaching questioned the goals for each lesson being taught, and allowed a sixth grade teacher in the twenty-fourth year of teaching to look within herself and ask questions about career choice and goals. It also prompted experienced teachers to (ii) take risks and experiment with ideas that would improve teaching in the classroom. In addition, the teaching portfolio project (iii) provided teachers with ongoing learning opportunities in respect of lessons being taught and assessment tools employed. This is illustrated by a teacher in the third year of teaching indicating that the portfolio allowed for further exploration and the implementation of new ideas in the classroom, such as working with learners to develop rubrics for the assessment of research projects produced by learners. Through this teaching portfolio senior teachers realized that if teachers stopped learning, they would not be able to motivate others to learn. The teaching portfolio project allowed teachers to (iv) familiarise themselves with the learners in the classroom and meet the needs of these learners. e.g. a fifth grade teacher used response letters to communicate with learners on a weekly basis. This method of communication allowed the teacher to provide better support for learners in terms of explaining further examples to learners, or to use response letters to communicate what the teacher expected from learners. If learners had specific problems, the teachers would set aside time for them.

Besides the benefits identified in Xu's study (2003: 252), other studies revealed that teaching portfolios could have several benefits for teachers, such as providing various sources of evidence of teaching performance. In previous years teachers had relied on learners' evaluations to obtain feedback about their teaching performance in the classroom. However, the learners' feedback is not always a true reflection of a teacher's teaching practice, because often these reflections take place during a few minutes in the final class of a particular year. Therefore the teaching portfolio encourages a variety of feedback sources that would offer a more diverse reflection of a teacher's practice and responsibilities in the classroom (Mues & Sorcinelli, 2000: 2).

Suggested examples of feedback as indicated by Seldin (1993: 8; 2000, 3) could be feedback by colleagues who have observed the teacher in the classroom, or colleagues who have reviewed an educator's teaching material and assessment activities.

In a study conducted by Zeichner & Wray (2001: 619) it was reported that student teachers and teachers claimed that engaging in the process of teaching portfolio construction allowed them to reflect on their teaching practice. Therefore the first purpose of the teaching portfolio discussed in this study is that of using the portfolio as a tool for reflection on teaching practice. A teaching portfolio illustrates the variety of teaching-related activities that occur in the classroom. For this reason it remains the teacher's responsibility to select, explain and document his or her teaching performance. The process of selecting the material provides an opportunity for the teacher to reflect and evaluate his or her teaching practice. This reflection and evaluation process provides the opportunity for change in teaching strategies and reflection on future teaching goals (Zeichner & Wray, 2001: 620).

Zeichner & Wray (2001: 617) state that a second benefit of the teaching portfolio is the nature and quality of social interaction among teachers. The development of teaching portfolios allows teachers to collaborate with each other, thereby allowing teachers to share their views and approaches to teaching (Mues & Sorcinelli, 2000: 2). Riggs & Sandlin (2000: 26) as well as Zeichner & Wray (2001: 617) support this view, saying that it was when teachers discussed the content and the significance of the content of the teaching portfolio that the value of the teaching portfolio was substantially enhanced. Xu (2003: 353) conducted research at a school that implemented a portfolio project and the results affirmed that professional collaboration among the teachers was one of the benefits of this project.

This collaboration was affected in three ways. Firstly, it became a vehicle for teachers to learn from one another. One teacher confirmed that it provided an opportunity for teachers to discuss the content written on paper about teaching styles and ideas amongst each other. The project became a common language where new teachers could learn from experienced teachers, and experienced teachers observed that new teachers had knowledge and insight, even if they lacked in years of experience.

Secondly, the working relationships between teachers and administrators improved, because the teaching portfolios provided the administrators with valuable information about teachers, while teachers felt that there was a liaison between administrators and teachers. Responses from teachers indicated, inter alia, that the dynamics of classroom teaching could be communicated to administrators through the portfolio, and that administrators recognised teachers' strengths and respected their knowledge.

Finally, the improved relationships between administrators and teachers, along with knowledge and confidence gained in writing and sharing work with colleagues, began to change teachers' attitudes about administrators and tertiary-based experts. A teacher at the Avery school examined knowledge more critically and was able to discern the types of literature that appealed to the learners. At the same time, teachers started viewing themselves as agents of systematic change, whereby teachers could share knowledge and skills about teaching portfolios with other teachers across schools, and in turn determine what other teachers were doing with teaching portfolios (Xu, 2003: 354).

A study by Tigelaar, Dolmans, De Grave, Wolhagen & Van der Vleuten (2006: 371-372) was conducted with five teachers and their personal coaches about their experiences with the teaching portfolio. This concept of coaching was defined as a relationship between an experienced, well-versed teacher as the coach, and a less experienced teacher. The coach provides guidance and support to the inexperienced teacher in such a manner that the teacher's education and development are facilitated. The coach also offers support, encouragement and feedback in order to facilitate reflection on teaching practice, which in turn leads to the inexperienced teacher improving his or her teaching practice.

Tigelaar *et al.* (2006: 372) states "the potential benefits of coaching include support, reassurance from colleagues, an incentive to collaborate by exchanging ideas and experiences, improved professional practice and empowerment for professional development". This concept of coaching falls under social interaction among teachers in the study by Tigelaar *et al.* (2006: 375). In this study teachers and coaches appreciated the meetings that took place between the two parties involved. Teachers thrived on the individual attention and feedback that pertained to their teaching

portfolio. The coaches assisted by analysing the functions performed by teachers and reviewing their reflections from varying perspectives. With this assistance coaches allowed teachers to derive a comprehensive and transparent plan of action for teaching practices. The social interaction among teachers and coaches was seen as highly valuable. Besides the social interaction with the coach, teachers also interacted with peers.

Chapman, Pettway & White (2001: 294) conducted a study at the Odum library involving eight reference librarians who participated in the portfolio programme. They had to self-select items to be placed in the teaching portfolio at the end of each semester. The positive aspects or benefits of the teaching portfolio that resulted from this research were, firstly, that the portfolio could be used to gather and present hard data and evidence related to teacher quality and learning by learners. The evidence of a programme presented in a teaching portfolio can justify an instruction programme to education department heads, university administrators and accrediting agencies (Chapman *et al.*, 2001: 295).

Secondly, the entries used to compile the portfolio allowed the librarians to critically think and reflect on teaching techniques, learning styles, content of instruction sessions and evaluation of teaching styles. When librarians completed an assessment of a particular course; the librarian was obligated to think about the goals of the instruction session, how these goals were going to be accomplished and how various activities could be integrated into the instruction session to accommodate learners' various styles of learning (Chapman *et al.*, 2001: 295).

Thirdly, a teaching portfolio could be used to share teaching expertise with new librarians. New librarians can use experienced librarians' portfolios as a reference for lesson plans, sample search topics and interactive activities. Through sharing ideas of teaching techniques and styles, time for preparation is reduced by having materials available to new librarians. These reference portfolios are not only used for new librarians, but also for the instruction programme's planning team. Therefore the portfolio becomes a written legacy of an instruction program or a course (Chapman *et al.*, 2001: 295).

In the fourth instance, the teaching portfolio functions as a tool for professional development or a means of self-reflection. This benefit of the teaching portfolio allows the librarian to concentrate on the aspects that he/she regards as critical to teaching. It also helps to identify areas of improvement, clarify the teaching philosophy and describe the evolution of his or her teaching practice. The teaching portfolio can be used for promotion and tenure purposes and should include evidence of teaching ability, planning of teaching strategies successes and student learning (Chapman *et al.*, 2001: 295). Other researchers like Mues & Sorcinelli (2000: 1) and Campbell & Brummet (2002: 26) reiterate the benefits of the teaching portfolio for promotion and tenure.

Another benefit of the teaching portfolio is professional growth. Riggs & Sandlin (2000: 26) indicate that professional growth could not be isolated from a teacher's daily work. Consequently the teaching portfolio, when implemented in the workplace, will benefit the teacher, who will be allowed to develop the teaching portfolio in conjunction with colleagues where it can be discussed and reflected upon.

Besides serving as a tool for reflection on teaching practices and the development of professional growth, the teaching portfolio is used to assess prospective teachers' readiness to receive a teachers' license. Interstate New Teacher Assessment and Support Consortium (INTASC) (1992: 9) states that all members of a particular profession, such as teaching, must be licensed by a particular state where the teaching post is taken up. Licensure is achieved by meeting standards of minimal competence that are established by each state through a professional standards board. Teaching portfolios are used for employment purposes. In certain universities job placement units assist teacher education graduates in preparing 'showcase portfolios' that represent a graduate's best samples of work when they apply for a teaching position (Zeichner & Wray, 2001: 615). In the South African context, this purpose of a teaching portfolio could be implemented in the teacher education system. Besides the various benefits that teaching portfolios offer to teachers, there are various factors that influence the development of the teaching portfolio.

## **2.7.5 Factors related to the development of the teaching portfolio**

In this study the respondents were asked to identify factors, or as stated in the questionnaire, skills and reconsideration of activities, related to compiling a teaching portfolio. The skills included journal writing, goal setting, self-assessment, self-reflection, presentation skills and critical thinking. The activities that teachers reconsidered during the compilation of the teaching portfolio included personal teaching outcomes, teaching methods, assessment methods, professional growth and beliefs about teaching and learning reflected in their conduct as a teacher. The researcher realised that while conducting research, there was no precise definition for each factor, since they were all interrelated. The first factor to be discussed is reflection, an integral part of teaching portfolio development.

### **2.7.5.1 Reflection**

Reflection upon the teaching portfolio would make it a more meaningful tool which would not be seen as a tedious administrative task. Painter (2001: 32) states that thoughtful reflection about the content that is to be placed in a teaching portfolio is the key to portfolio success. Without reflection the teaching portfolio would be a scrapbook filled with artifacts, showing little evidence of a teacher's intellectual and professional ideas (Painter, 2001: 32; Wyatt & Loper, 2004: 33). Wyatt & Loper (2004: 33) indicate that the reflection stage is the ownership stage of the teaching portfolio. The reflective stage constitutes the section where the teacher poses the question, "Why did I include these artifacts in my portfolio?" (Wyatt & Loper, 2004: 33).

Painter (2001: 32) suggests that teachers should consider the following aspects when reflecting upon artifacts to be placed in a teaching portfolio: consider the reason for the item selected being better than other items; the artifact selected should display evidence of a teacher's growth and success against one or more of the performance standards; the teacher must consider that readers who will be scrutinising the portfolio out of context should see the reasons for the teacher including a particular piece of evidence; do the chosen artifacts reflect the teacher's professional growth and accomplishments; and lastly, the artifacts must represent who the person is as a

teacher. The WCED could pose these questions to the teachers, so that the teaching portfolio can be used as a reflective tool and not only as an assessment tool.

However, Painter (2001: 32) states that aspects to be considered when choosing artifacts for a teaching portfolio are not sufficient. Teachers should provide a narrative statement through an audio or video presentation or in written format, and thus support and even defend the artifacts selected for the teaching portfolio. Narratives will give the reader insight into the teacher's growth. Lyons (1999: 64) calls these narratives a set of reflections or critical interrogations that should accompany each chosen artifact to document what the teacher has learnt about teaching and learning. The narrative should include a description of the artifact and a justification of the reason for the artifact's inclusion within the framework of the standards. It should also convey evidence of what the teacher has learnt about him- or herself and about the process of learning (Painter, 2001: 32).

Driessen, Van Tartwijk, Overeem, Vermunt & van der Vleuten (2005a: 1235) conducted a study that determined the conditions resulting in the successful reflection on portfolios in undergraduate medical education. In this study the mentors defined reflection as "thought processes that help students improve their professional performance", adding that "reflection should focus on actions and their consequences" (Driessen *et al.*, 2005a: 1235). This ability to reflect would link directly with the students' future work as medical professionals, because reflection requires that one transfers skills, knowledge and understanding from familiar situations to new situations (Briede, 2005: 4; Driessen *et al.*, 2005a: 1233). When students reflect upon the content in the teaching portfolio, skills of evaluation and critical thinking are required. Students should therefore be encouraged to think critically when conducting studies in a chosen discipline (Briede, 2005: 4). The research conducted by Driessen *et al.* (2005a: 1230) determined that for reflection to occur successfully, the following conditions must be in place: coaching, portfolio structure and guidelines, appropriate experiences and material, and summative assessment for reflection.

Driessen *et al.* (2005a: 1233) identified coaching as one of the conditions for successful reflective portfolio development, an aspect that is absent in the teaching

portfolio process of the WCED. According to Driessen *et al.* (2005a: 1233) coaching plays a fundamental role in the development of a teaching portfolio, because reflection does not come naturally to most student teachers. Coaches or mentors have to explain to learners the types of questions that should be asked when reflecting on personal performance. Coaching also assists student teachers in identifying learning needs and devising lesson plans. Mentors indicated that the lesson plans of student teachers comprised resolutions rather than well-planned steps to appropriate learning goals. Seldin (2000: 4) indicates that coaching is beneficial when compiling a teaching portfolio. If a teaching portfolio is compiled in consultation with the departmental chairperson, a colleague or an educational specialist, guiding questions can be posed to the teacher. These questions could refer to reasons for compiling a teaching portfolio, lessons to be learnt from its compilation, areas of teaching practice that should be reflected upon, and types of evidence to be collected for the teaching portfolio.

The second condition identified by Driessen *et al.* (2005a: 1233) was structure and guidelines. Mentors stated that suitable factors for reflection should include a well-structured portfolio and guidelines about the expectations or content for the portfolio. On the other hand, the portfolio structure should not be too rigid, because too much structure could be an obstacle for student teachers who possessed good reflective skills. A structured portfolio would be advantageous to students who have not yet mastered the skill of reflection, or for weak students.

(Driessen *et al.*, 2005a: 1233) identified experiences and material as a third condition that would deem the successful reflection of portfolios. For a portfolio to be effective, it should contain a sufficient amount of variety and a number of interesting experiences or artifacts as topics for reflection. Mentors reported that a lack of experience was problematic, because it provided very little content for the student teachers to reflect upon, and this resulted in reflection being a futile exercise.

Summative assessment is the last condition that can result in the successful reflection of portfolios (Driessen *et al.*, 2005a: 1234). Mentors recommended that the reflection on the portfolio should be a summative assessment to ensure that student teachers and mentors take it seriously. The mentors agreed that if the portfolios were not assessed,

students and mentors would not invest quality time and energy in compiling them. A few mentors argued that test-directed portfolio compilation would be the downfall for summative assessment if the first three conditions were not achieved, namely, coaching (if the student teacher does not discuss the content of the portfolio with the mentor), structure and guidelines (if there are too many rules or guidelines and experiences and material), and insufficient and appropriate experiences. This means that effective portfolios require considerable effort and time from students and mentors. If the portfolio is not assessed in a summative format, students and mentors might question the entire portfolio process. The mentors who assisted students in compiling the portfolios were interviewed. The mentors responded that through the compilation of portfolios and the written reflections on the activity, student teachers fostered a critical attitude towards personal performance and direction for personal development. Driessen *et al.* (2005a: 1233, 1234) stated that student teachers could learn how to reflect if favourable conditions were created. Driessen *et al.* (2005a: 1235) state that the results of the study suggest that portfolios are valuable instruments for the development and assessment of undergraduate medical students' reflective skills.

Wyatt & Looper (2004: 34) point out that the reflection stage of portfolio development makes the process authentic, because the compiler of the teaching portfolio, that is the teacher, states the value of each artifact that was placed in the portfolio. In the South African education system, teachers are not required to reflect on the teaching portfolio. This skill can be taught to teachers to ensure that personal reflection on performance and professional development takes place.

#### ***2.7.5.2 Self-evaluation and self-reflection***

Klenowski (2002: 31) uses the term self-evaluation instead of self-assessment, because it implies more than ascribing a grade or an attainment of standards. Self-evaluation entails evaluation of a teacher's performance in the classroom in terms of strengths and weaknesses and indicates how the teacher has performed against a set of criteria or standards. Before self-evaluation occurs, the teacher first has to gain an understanding of the criteria and standards being used, and secondly has to be aware of what is considered meritorious. Thirdly, the teacher has to reflect upon the implications for future action, which entails reflecting upon the strengths and

weaknesses of the classroom practice and methods to improve it. Once the criteria and standards have been established, the teacher's selection of work for the teaching portfolio takes place, which is a learning process in itself. The selection of evidence for the teaching portfolio is a learning process, because when the teacher evaluates his or her performance, strengths and weaknesses are identified with the intention of improving the teacher's learning outcomes or goals (Klenowski, 2002: 30).

Chapman *et al.*, (2001: 296) uses the term self-reflection, stressing that it is a major benefit of portfolio development. Self-reflection involves analysing whether the goals and outcomes set by teachers have been achieved or not, and the reasons for this state of affairs. Part of the process of self-reflection is the self-selection about artifacts to be placed in the teaching portfolio. It is under each teacher's control to collect evidence for the portfolio (Chapman *et al.*, 2001: 297).

### ***2.7.5.3 Self-assessment and professional development***

Once the evidence has been collected for the portfolio, the real work begins. The teacher must establish how all the artifacts will be assembled into an outstanding profile of the teacher him- or herself. The teaching portfolio should be assembled in such a way that it displays who the teacher is, the experiences of the teacher and how the teacher feels about teaching, because the documents will sanction the individual's teaching, application and organisational skills. Teachers should bear in mind that the professional self is mirrored in the teaching portfolio; from the physical characteristics such as the type of paper chosen, to the items selected for assessment of the portfolio (Wyatt & Looper, 2004: 59). Riggs & Sandlin (2000: 25) state that the compilation of the teaching portfolio is a process that is self-developed and therefore promotes continual self-review of the teacher. Since the teaching portfolio requires a display of the holistic view of the teacher, it cannot be compiled on short notice. The artefacts chosen for the teaching portfolio must be collected from daily teaching activities conducted by the teacher and learner on a regular basis. Therefore the teaching portfolio sends out a message to the reader about the teacher. The goal of the compilation of the teaching portfolio is to reflect the past, present and future of the teacher (Wyatt & Looper, 2004: 60).

While compiling the teaching portfolio, the teacher has the opportunity to reflect on his or her teaching practice and teaching standards, which in turn guides the selection of items for the portfolio. Compiling a teaching portfolio is a self-assessment activity for the teacher, because through collecting evidence for the portfolio; the teacher recognises areas providing strong, ample evidence of meeting professional standards, as well as areas of the teaching portfolio that lacks the necessary evidence. Recognition of the weak areas could motivate the teacher to pursue professional development in these particular areas (Riggs & Sandlin, 2000: 25). Seldin (2000: 4) identifies four key areas that teachers should take into consideration when compiling a teaching portfolio, namely, reconsidering teaching activities, rearranging priorities, rethinking teaching strategies and planning for the future. Therefore the teaching portfolio addresses professional development that can be a bridge to goal setting (Riggs & Sandlin, 2000: 26). It can be deduced that the aspects of reflection, self-assessment and professional development are interlinked when a teaching portfolio is being compiled. Therefore the teaching portfolio serves as an important tool for the personal and professional growth of a teacher. Campbell & Brummet (2002: 26) confirm that the teaching portfolio is important for continuing professional development, which in turn is significant for a teacher's career.

Painter (2001: 33) states that the teaching portfolio is “first and foremost a tool to support teacher learning”. Through developing a teaching portfolio teachers are obligated to think about the beliefs and practices conducted in the classroom and to identify discrepancies between beliefs and teaching practices. Teachers who are able to articulate their beliefs; are able to justify and reflect on their own practices. They are also able to share teaching practices with colleagues and are prepared to research various methods to improve instruction and support for learners.

For this reason Painter (2001: 33) determined that teachers would require guidance from principals when compiling portfolios in terms of its organisation, selection, rationalisation and the critique of contents to be placed in the portfolio. It was suggested that teachers be given release time, allowing them to create and engage in professional dialogue with other teachers about instruction, assessment, school and provincial goals. “Professional development is at the heart of supervision; the primary purpose of teacher evaluation is teacher growth; teachers and principals must assume

an instructional leadership role”. Riggs & Sandlin (2000: 26) indicate that to promote continuous teacher growth and support, the development of the teaching portfolio should span over one year. Riggs & Sandlin (2000: 26) state that the teaching portfolio documents stimulate the professional development of a teacher; therefore it can serve as a link to individualized goal setting.

#### **2.7.5.4 Goal setting**

The teaching portfolio should show evidence of teachers' goals and standards to be demonstrated in the classroom (Lyons, 1999: 64). Each goal identified in the teaching portfolio should be accompanied by a plan of action, in other word the teacher must envisage a specific way of how each goal will be achieved. The goals set should document ways in which teaching in the classroom will be improved (Seldin, Annis & Zubizaretta, 1995: 13). Setting goals while developing a teaching portfolio allows a teacher to reflect on his or her teaching career.

#### **2.7.5.5 Employment and career advancement**

Hurst, Wilson & Cramer (1998: 579) indicate that the teaching portfolio can be used for career evaluations or in an interview for a job transfer or promotion, because they provide teachers with vivid visual representations of themselves. A teaching portfolio provides a holistic picture of the teacher through a collection of artifacts that are representative of a teacher's professional and personal life. The process of compiling the teaching portfolio allows teachers to reflect about their growth as teachers and learners. Therefore the teaching portfolio is a valuable tool in a job interview, because it may enhance the applicant's confidence when the interviewer poses questions about the teacher's preparation and teaching practices.

Visual examples placed into a teaching portfolio support the teacher's strengths and passion for education. Thus the interviewer hears a stronger voice than through question-and-answer data communicated during an interview. Examples included in the teaching portfolio can portray the teacher as an active community member. It can display skills and abilities, emphasise hobbies or interests and highlight personal attributes that are not evident in an interview or curriculum vitae (Hurst *et al.*, 1998: 578-579).

It is clear that the teaching portfolio is advantageous for seeking employment or career advancement in that it assists teachers in job interviews, provides evidence of teaching strengths and competencies and clearly indicates a teacher's future goals and objectives. In the South African context student and job-seeking teachers would be well-advised to compile a teaching portfolio before embarking on searching for employment.

A study conducted by Delandshere & Arens (2003: 61) determined that more than fifty percent of the student teachers used the teaching portfolios when applying for a post. They also indicated that the teaching portfolio was used to supplement documentation in the job interview. On the other hand, student teachers did not consider the portfolio as of prime importance for developing an understanding of teaching practice. Students in this study expressed the opinion that the teaching portfolio could be used as a tool to exhibit personal development in terms of their professional growth as teachers, a perception not held by all the students in the three programmes (Delandshere & Arens, 2003: 61).

Seldin (2000: 6) reports a resounding positive response to the development of the teaching portfolio after mentoring about four hundred faculty members. It is not to be seen as a tedious task, because it only takes a few days to prepare and in the light of the future benefits, any constraints are surmountable. The teaching portfolio allows teachers to describe teaching strengths and accomplishments, determines decisions for promotion and tenure and stimulates self-improvement.

From the research it is evident that various factors influence the development of the teaching portfolio. Factors such as journal writing, presentation skills, personal teaching outcomes and teaching methods are encompassed in the reflection about teaching portfolios. It should be noted that the teaching portfolio is not a mere collection of artifacts, but a valuable tool that documents the knowledge, skills, abilities and professional growth of a teacher, organised in an orderly manner.

### **2.7.6 Organisation of the teaching portfolio**

Once the purpose, audience, type, collection and selection of artifacts have been determined, the assembling of the portfolio may start. The primary objective is to assemble a teaching portfolio into a coherent, attractive and functional whole, irrespective of its function as material for a job review or personal development. The storage of the contents is dependent upon the purpose of the teaching portfolio. It can be stored in a three-ringed binder if the portfolio is to be used for job review. If items in the portfolio are one of a kind, and to be reviewed by many readers, acetate flip files can be used for easy access. A teaching portfolio's appearance must be appealing to the reader. It should be thought of as “windows” into the knowledge, skills, talents and individuality of the teacher. Therefore it is critical that the cover, organisational scheme and page layout are reflected in the content and overall design of the teaching portfolio (Campbell & Brummet, 2002: 30). The teacher can add his or her own finishing touches to the portfolio. A teaching portfolio can be assembled by various professions with different purposes and views in mind.

Driessen, Van Tartwijk, Vermunt & Van der Vleuten (2003: 19) and Driessen, Van der Vleuten, Schuwirth, Van Tartwijk & Vermunt (2005b: 216) conducted studies that explored the use of the portfolio in undergraduate medical training and the portfolio assessment procedure of first year undergraduate medical curriculum. The first year medical students had to compile a portfolio in both studies. A set structure in terms of the various roles in the medical profession was given to the students, guiding them as to how the portfolio should be assembled. Each section of the portfolio had to include evidence of self-assessment and the analysis of the personal strengths and weaknesses on a role-by-role basis underpinned by evidence. The structure of the portfolio was as follows: role as a medical expert, role as a scientist/researcher, role as a healthcare worker, role as a person, a summary of the student's strengths and weaknesses, a report of an interview conducted about a student's progress or a student exiting the system and an annexure consisting of evidence (Driessen *et al.*, 2003: 19; Driessen *et al.*, 2005b: 216).

Wyatt & Loper (2004: 8) developed an approach to portfolio development, through an acronym called CORP. The letters in CORP represent the following operations in

the portfolio process: collection of evidence, organisation of evidence, reflection on the selected evidence and presentation of the teaching portfolio. The first step of the CORP process is a collection of evidence about teaching experiences of the teacher (Rodriguez-Farrar, 2006: 8). All parts of the portfolio, namely the products of teaching, the self-generated material and the material from others should form a coherent whole that is representative of a sound teaching portfolio (Seldin, 2000: 2). The teacher must bear in mind that evidence is to be collected in a manner that would ensure that the teaching portfolio is a focused portrait of an individual's specific abilities to perform and think as a teacher (Campbell & Brummet, 2002: 26).

The second step in the CORP process is the organisation of evidence. Once the evidence has been collected, the teacher needs to determine the central theme of the teaching portfolio that could be linked to the purpose of the portfolio, e.g. whether the teacher would organise the portfolio to document evidence demonstrating an improvement of teaching skills (Rodriguez-Farrar, 2006: 10). Another method to organise the teaching portfolio is to divide the evidence into three categories, namely personal, academic and professional. Irrespective of the purpose of the portfolio, everything that has contributed to the teacher's successes should be documented in a teaching portfolio. The teacher needs to bear in mind that the organisation of the portfolio may change, depending upon the purpose, the reader of the teaching portfolio and the time-frame for compiling the teaching portfolio (Campbell & Brummet, 2002: 28).

Reflection about the selected evidence is the third step in the CORP process. Campbell & Brummet (2002: 27) state that the reflective process is one of the most important aspects in the compilation of the teaching portfolio. Once the evidence is collected and organised, the teacher must write reflective statements and summaries about the evidence that has been collected. A reflective statement allows the teacher to identify teaching goals in a specific context. These reflective statements and summaries should be short and concise and the teacher must keep the reader in mind, avoiding long and drawn out reflective statements and summaries. Therefore these statements and summaries describe the evidence selected and explain its significance in the teaching context (Rodriguez-Farrar, 2006: 10).

The final step in the CORP process is the presentation of the portfolio. The primary objective of presentation is to assemble a coherent, attractive and usable teaching portfolio. The first option is the file format. The portfolio can be presented in a three-ringed binder, the most common method, or in a notebook with zippers for storing videotapes or compact discs. This type of material could also be stored in plastic sleeves that will prevent holes being punched in the document (Campbell & Brummet, 2004: 30).

A digital or electronic format is the second option for presenting a teaching portfolio. Niguidula (2005: 44) defines digital portfolios as multimedia collections of a student's or teacher's work stored and reviewed in a digital format. This format allows for a demonstration of the teacher's creativity with regard to the design and display of the portfolio. The digital portfolio formats include hotmail files, compact disc ROMs, portable digital format (PDF) files and hypertext or media files (Campbell & Brummet, 2002: 30). WCED Consumer Studies teachers have not yet used this digital format.

The CORP process would provide a clear and concise method for WCED teachers compiling a teaching portfolio. "The goal of portfolio development is used to document teaching skills, experiences and credentials in a meaningful, positive package" (Rodriguez-Farrar, 2006: 4).

Driessen *et al.* (2003: 19) state that the portfolio experience can be a frustrating one if insufficient structure is provided for teachers, especially for those compiling a teaching portfolio for the first time. These portfolios could be used for formative and summative assessment.

### **2.7.7 Assessment of the teaching portfolio**

While conducting research about assessment and the teaching portfolio, the researcher realised that not many research articles have been published on portfolios and the assessment of in-service teachers. Most of the studies were conducted with pre-service students enrolled in teacher education programmes. St Maurice & Shaw (2004: 17) support this point by stating that "teacher portfolios, especially for

assessment purposes, have not yet been systematically analysed: although there are more than four thousand entries under the keywords ‘teacher portfolio’ in the Education Resources Information Centre database, so far there seem to be no studies of teacher portfolios yielding large-scale longitudinal data”.

“Assessment and teaching are integrated in the process of portfolio development”. (Klenowski, 2002: 44). The artefacts contained in the teaching portfolio reflect evidence that could bring about change in the teaching and assessment practices of the teacher (Klenowski, 2002: 44). Portfolio assessment is used extensively in educational settings as a way to monitor and measure progress, through documentation of the process of learning or change as it occurs (Sewell, Marczak & Horn, n.d.: 1).

#### ***2.7.7.1 Use of portfolio assessment in the design and development of the teaching portfolio***

Barton & Collins (1997) in Sewell *et al.* (n.d.: 4) identify three main factors that guide the design and development of the teaching portfolio, namely purpose, assessment criteria and evidence for assessment.

##### **1. Purpose of the portfolio**

Before developing the teaching portfolio, the first factor to be determined is its purpose. The purpose of the teaching portfolio will define the types of materials to be collected as evidence. The teacher needs to determine the use of the portfolio, whether it be for job promotion, tenure, licensure or professional development.

##### **2. Assessment criteria**

Once the purpose or goal of the teaching portfolio is determined, the criteria or standards have to be set up and the methods used to achieve the assessment criteria have to be planned. Once the assessment criteria have been determined, the items required for meeting the criteria and purpose of the teaching portfolio are collected.

##### **3. Evidence**

When collecting evidence for the teaching portfolio, certain features need to be considered. These include: type of sources of evidence, amount of evidence to meet standards and goals of assessment process, time frame for evidence collection,

congruency of sources of evidence, reflection upon evidence collected and ways to use evidence to modify a learning programme or evaluation.

Barton & Collins (1997) in Sewell *et al.* (n.d.: 4-5) state that evidence can include artifacts (items conducted inside the classroom), reproductions (interviews or projects completed outside the classroom), attestations (statements by colleagues or educational professionals about the compiler of the portfolio) or productions (items documented especially for the portfolio such as reflection about teaching and learning). Each item is added to the teaching portfolio, because it adds to the attainment of the goals related to the portfolio.

#### **2.7.7.2 Characteristics of portfolio assessment**

Barton & Collins (1997) in Sewell *et al.* (n.d.: 5-6) suggest that certain characteristics are important when developing a teaching portfolio for assessment. These characteristics include multi-sourcing, authenticity, dynamic and explicit evidence, integration, ownership and a multi-purpose function.

##### **1. Multi-sourcing**

Evidence should come from various sources, such as people (statements and observations from teachers, colleagues and parents) and artifacts (test grades, projects, journals, audio- and videotapes of classroom teaching).

##### **2. Authenticity**

Evidence should be collected from the compiler of the portfolio and linked to the learning outcomes, assessment standards and criteria of the learning programme.

##### **3. Dynamic evidence**

Evidence should capture growth and change at various times in a particular learning programme. Evidence or data should include “best work”, but also various levels of mastery, for example best, average and weak levels of mastery. These forms of evidence are self-selected and document a richer understanding of the process of growth and change.

#### **4. Explicit evidence**

The purpose and goals of the portfolio development process are to be clearly defined. Teachers who are clear about the expectations placed upon them can take responsibility for collecting the appropriate evidence.

#### **5. Integrated approach**

Teachers should be able to apply knowledge and skills to real-life situations. The evidence collected should correspond to the activities of the subject and life experiences.

#### **6. Based on ownership**

The portfolio assessment process should allow the teacher to engage in the processes of reflection and self-evaluation when selecting evidence to be placed in the portfolio, and through the setting or modifying of goals. Others are not merely evaluating the teaching portfolio; it could also be used for job promotion or licensure.

#### **7. Multi-purpose function**

A well-designed portfolio assessment process evaluates the effectiveness of a learning programme and the growth of the teacher simultaneously. The teaching portfolio serves as a reference tool for other teachers or staff in a school setting. In other words, other educational staff can refer to another teacher's teaching portfolio for alternative or effective teaching strategies.

In an educational setting teachers assess one another's teaching portfolios to determine if the required evidence is present, by independently rating each others portfolios (Barton & Collins 1997 in Sewell *et al.*, n.d.: 7). The criteria that teaching portfolios are assessed against may vary among researchers.

##### ***2.7.7.3 Assessment criteria applied to the assessment of the teaching portfolio***

Mues & Sorcinelli (2000: 9) state that experts seem to agree that the content of the teaching portfolio and the assessment criteria used to evaluate the portfolio should be linked to the goals of the teacher's education department, in this case the WCED, and the mission statement of the teacher's school. Therefore a clear set of assessment criteria and a system of quality assurance must be determined before the teacher

embarks upon compiling a teaching portfolio. To ensure that the teacher meets the criteria and quality, the review committee should state the items to be included in the teaching portfolio, the length of the portfolio and the assessment criteria used to judge the teaching portfolio (Mues & Sorcinelli, 2000: 9).

Seldin (1988) in Seldin (1993: 71-72) identifies four key requirements or criteria that are used to evaluate a teaching portfolio. First of all he mentions relevance, which means that the crucial elements in teaching, namely teaching strategy and the artefacts selected for evaluation, should be linked to one another. In other words, the evidence in the portfolio will meet the goals and the criteria of the teaching portfolio. Secondly, he refers to reliability, which means the consistent judgement of the same teaching portfolio by various assessors that may include colleagues, administrative staff or non-education personnel. Even though not all assessors would produce exactly the same feedback, consensus should generally be reached. Thirdly, the teaching portfolio should meet the criteria of practicality, meaning that the length of the portfolio should not be infinite but limited, easily understood and user-friendly to personnel or educational committees. When the teaching portfolio is being read and evaluated, it should not consume an inordinate amount of time or energy. If the criterion of relevance is achieved, the criterion of practicality will also be achieved. Fourthly, acceptability means that the portfolio being evaluated must be unanimously accepted by the assessors of the portfolio, consisting of colleagues, administrative personnel or non-education personnel. The acceptability of the portfolio can be achieved by school leadership focusing on the attitudinal and interpersonal aspects instead of the technical soundness of the teaching portfolio.

Mues & Sorcinelli (2000: 9) have identified the inclusion of evidence and consistency as criteria to assess the teaching portfolio. Criteria used to assess the portfolio can include the type of evidence included in the portfolio to motivate claims made by the teacher, e.g. evidence of teaching accomplishments, student learning and efforts to improve teaching practice. The criterion of consistency should be assessed to determine whether the teaching philosophy is the underlying thread between the accompanying evidence of teaching strategies, teaching effectiveness and efforts to improve teaching practice.

Darling (2001: 111-112) conducted a study with thirty-one pre-service teachers. These teachers had to complete various forms of assessment, the teaching portfolio being one of the assessments. Assessment criteria were negotiated with the student teachers and it was decided that each portfolio would be assessed as excellent, good, fair or unacceptable. The criteria would include coherence and cohesiveness (referring to elements of the portfolio fitting together and forming a strong unified statement); comprehensiveness (in terms of all aspects of the subject area being addressed in some way or other); clarity (where the aim and purpose of each artefact is clear and carefully designed); creativity (evidence that the teacher's own voice and point of view are presented imaginatively); and communicative potential (regarding expression and the form of the teacher's reflection upon the teaching experience in a way that it can be shared with others) (Darling, 2001: 112). These criteria can be used by the WCED to assess teachers' teaching portfolios.

Zeichner & Wray (2001: 618) researched the teaching portfolio in the United States teacher education programmes and found that the Michigan State University had a set of criteria for evaluating the teaching portfolios of student teachers. The evidence placed in the teaching portfolio was assessed against the following criteria: the goals for learner learning are clear and valuable, learner tasks and activities correspond to the goals, and assessment activities reflect an understanding of the learner's progress and indicate that the next step in the assessment process is logical.

Delandshere & Arens (2003: 57) conducted a study to examine the quality of evidence in three teacher education programmes where student teachers developed teaching portfolios in preparation for teacher licensure. The Interstate New Teacher Assessment and Support Consortium (INTASC) standards or National Board for Professional Teaching Standards (NBPTS) standards were crucial in the compilation and evaluation of the teaching portfolio in this study. In all three education programmes the INTASC principles, or some thematic reformulation of these principles, were used as assessment or rating criteria for the organisation and presentation of the teaching portfolio. In one of the programmes, student teachers were requested to link each portfolio artifact to the INTASC principles and to provide a brief explanation about how the evidence collected met the standards (Delandshere & Arens, 2003: 64).

The INTASC principles were drafted because there was a need to restructure the United State's schools, with a view to meeting the demands of a knowledge-based economy that redefined the mission of schooling and the job of teaching. The education system was restructured as firstly, education officials wanted to establish a system that did not merely offer education, but expected schools to ensure that all learners learnt and performed at high levels. Secondly, education should not be about only covering the curriculum, but teachers were expected find methods that would support and meet the needs of the learners. Therefore this new educational approach required teachers to possess a more extensive knowledge and skills base, apart from applying more learner-centred approaches in classroom. With the implementation of more learner-centred approaches to teaching and schooling, supportive policies for preparing, licensing and certifying teachers, as well as for the regulation and accreditation of schools, needed to be put in place (INTASC, 1992: 5).

Therefore, in 1987 these supportive policies were established through the NBPTS to develop standards for the advanced certification of highly skilled, experienced teachers, as is the case for other professions such as medical practitioners and accountants. Simultaneously, INTASC, a programme of the Council of Chief State School Officers was established to enhance collaboration among the state education departments to rethink teacher assessment for initial licensing as well as the preparation and induction of new teachers into the teaching profession. The NBPTS and INTASC are united in their view that the education fraternity requires a set of performance-based standards and assessment strategies that capture teachers' reasoned judgements and evaluate the activities that teachers use in authentic teaching situations (INTASC, 1992: 5). Consequently the INTASC standards and NBPTS were developed to determine the knowledge and actions required from a teacher when entering a classroom (Delandshere & Arens, 2003: 59).

The INTASC task team developed a set of standards depicting a common core of teaching knowledge and skills that all new teachers had to acquire. These common core standards were followed by additional specific standards for each learning area such as Consumer Studies, and the various levels of schooling such as GET phase and FET phase. The common core set of standards outlined the general principles and foundations of practice covering all speciality areas, such as the knowledge of learner

learning and development, curriculum and teaching, contexts and purposes that create a set of professional understandings, as well as abilities and commitments that all teachers should share across the curriculum. The aim of the INTASC principles was to encourage a common commitment to ethical practice and a foundation of knowledge bonding the members of a profession and creating a common language. This would entail setting certain understandings and beliefs that allow professionals to talk and work together towards a common goal in the interest of the learners. Secondly, and at a later stage, a set of assessment possibilities could enhance these standards across speciality areas by developing underlying knowledge of various concepts that enlighten teaching practice in many different ways (INTASC, 1992: 6).

The INTASC standards were developed in conjunction with the advanced certification of the NBPTS. The compatibility of these two sets of standards establishes the coherent approach to educate and license teachers, based upon shared views among the various states in the United States of America and within the teaching profession of what comprises professional teaching (INTASC, 1992: 3). Each INTASC principle addresses the knowledge, disposition and performances regarded as essential components for each teacher, regardless of the subject area (INTASC, 1992: 14-34). For the purposes of this study, only the principles will be listed.

The INTASC principles are as follows: *Principle 1*: The teacher understands the central concept, tools of inquiry and structure of the discipline(s) the teacher teaches and can create meaningful learning experiences that make these aspects of the subject matter meaningful for learners. *Principle 2*: The teacher understands how learners learn and develop and can provide learning opportunities that support intellectual, social and personal development. *Principle 3*: The teacher understands how learners differ in approaches to learning and creates instructional opportunities that are adapted to a diverse group of learners. *Principle 4*: The teacher understands and uses a variety of instructional strategies to encourage learners' development of critical thinking, problem solving and performance skills. *Principle 5*: The teacher uses an understanding of individual and group motivation and behaviour to create a learning environment that encourages positive social interaction, active engagement in learning and self-motivation. *Principle 6*: The teacher uses knowledge of effective verbal, non-verbal and media communication and supportive interaction in the classroom.

*Principle 7:* The teacher plans instruction based upon knowledge of subject matter, learners and the community and curriculum goals. *Principle 8:* The teacher understands and uses formal and informal assessment strategies to evaluate and ensure the continuous intellectual, social and physical development of the learner. *Principle 9:* The teacher is a reflective practitioner that continually evaluates the effects of his/her choices and actions on others, including learners, parents and other professionals in the learning community who actively seek opportunities to grow professionally. *Principle 10:* The teacher fosters relationships and agencies in the larger communities to support learners' learning and support (INTASC, 1992: 14-33). Similar studies to that of Delandshere & Arens (2003: 59) showed that many educational facilities in the United States of America use these standards to assess teaching portfolios compiled by pre-service and in-service teachers, e.g. the University of Wisconsin uses its own teaching standards based on the INTASC principles. Student teachers have to compile an exit level teaching portfolio based on the INTASC principles (St Maurice & Shaw, 2004: 19). Delandshere & Arens (2003: 59) conducted a study with three tertiary institutions that had experience in using teaching portfolios. In this study the students presented the teaching portfolio in accordance with the INTASC principles. These studies display the evidence that certain educational institutions use the said principles in teaching portfolio development.

The DoE can adapt these principles to the South African context, thereby providing teachers with guidelines as to how teaching portfolios can be structured while evidence is collected. Since the DoE had no criteria to evaluate a teaching portfolio when this study was conducted, the INTASC principles can be adapted to the South African context and thus produce a set of relevant assessment criteria to evaluate teaching portfolios.

While the INTASC principles or standards are used to license new teachers, the NBPTS are used to certify experienced teachers in the United States of America. To acquire certification teachers have to compile a teaching portfolio documenting the teacher's professional life, use of instructional materials and the assessment of learning activities conducted in the classroom. The artefacts compiled in the teaching portfolio must link up with the INTASC principles and the NBPTS core propositions

(Wyatt & Looper, 2004: 116). The five NBPTS core propositions are as follows: firstly, teachers are committed to learners and learning. Secondly, teachers know the subjects being taught and how to teach these subjects to learners. Thirdly, teachers are responsible for managing and monitoring learner learning. Fourthly, teachers think systematically about the teaching practice and learn from experience. These core propositions reflect the knowledge, skills and dispositions that a quality teacher must achieve. The same propositions act as guidelines for the collection of evidence for the teaching portfolio. Once the CORP process is followed and completed, the evidence collected can be checked against a rubric containing the five NBPTS core propositions to determine if the compilation of the teaching portfolio is on target (Wyatt & Looper, 2004: 118-120).

Portfolio assessment is a method used to understand the teacher that is submitting the teaching portfolio. Whilst compiling the portfolio, the teacher can pose certain questions to him/herself. These questions can include the following: does this teaching portfolio display the best possible picture of me as a teacher, does the portfolio reflect the teacher's knowledge of the subject matter being taught, as well as the skills and dispositions of teachers in a specific field of teaching, and does the teaching portfolio meet the standards set by the personnel that would be evaluating the portfolio? (Wyatt & Looper, 2004: 122). These are questions that the teacher can use as criteria for compiling the teaching portfolio. If there were a limited amount of evidence to these questions, the portfolio would require further work.

The INTASC principles and the NBPTS core propositions provide clear guidelines to new and experienced teachers about professional identity, a clear work ethic and the requirements of a good quality portfolio. The WCED should develop a similar clear set of standards that would guide teachers in developing a good quality teaching portfolio and establishing a positive work ethic among all teachers, which would in turn ensure that learners attain a high performance level, irrespective of their socio-economic status.

The criteria used to assess the quality of the teaching portfolio are dependent upon its purpose. The teaching portfolio can be assessed for various purposes, namely as an assessment tool to evaluate the learning and assessment activities that a teacher is

using in the classroom, for promotion, tenure, certification or licensure of teachers. In the South African context the teaching portfolio is used as an assessment tool to portray the collection of learning and assessment activities carried out in the classroom. However, the South African Education Department needs to develop a set of standards that all teachers in the education system can conform to when compiling a teaching portfolio, irrespective of the subject area. A standard set of criteria would improve the quality of a teaching portfolio. Not only must the criteria be transparent to teachers; education officials should also determine if the teaching portfolio is to be used for formative and summative assessment.

#### ***2.7.7.4 Types of assessment used to evaluate the teaching portfolio***

During the teacher's career, the teaching portfolio will serve different purposes, and can therefore be evaluated formatively or summatively. For formative assessment, a graduate student who is enrolled in a programme that requires the development of a teaching portfolio is used to assess the performance of the student as a teacher. When a teacher prepares a teaching portfolio for employment, a job promotion or a teaching award, the teaching portfolio undergoes summative assessment. Professional development is never complete, but with summative assessment the teaching portfolio represents evidence of the teacher's professional journey and accomplishments to date. (Seldin *et al.*, 1995: 15).

##### **1. Formative assessment**

With formative assessment, the teaching portfolio serves as a tool to identify the teacher's professional strengths and weaknesses. Once the strengths and weaknesses have been determined, the teachers converse with the assessor to review the artifacts in the teaching portfolio and design a strategy to build on the strengths and address the weaknesses (Riggs & Sandlin, 2000: 22). A rubric can assist with formative evaluation or the evidence can be reviewed in conjunction with standards set by education administrators like the INTASC principles (Riggs & Sandlin, 2000: 24).

For formative assessment to be meaningful, the feedback from peers or coaches about teaching achievements, strengths and weaknesses must result in transformation in teaching and learning by the teacher. This form of assessment takes place while the teacher is collecting evidence for the teaching portfolio, not when the work for the

portfolio is complete. Formative assessment is development, meaning that at this stage the teaching portfolio is regarded as work in progress. The teaching portfolio aims to identify areas that require remediation, so that successful instruction and learning can take place (Klenowski, 2002: 56).

## **2. Summative assessment**

Summative assessment is an overview of past performance. The evidence collected for a teaching portfolio is accumulated over a specific period of time (Klenowski, 2002: 65). Summative assessment takes place on completion of the portfolio. The evidence in the teaching portfolio represents a complete picture of the teacher's knowledge, skills and abilities over time (Riggs & Sandlin, 2000: 24). There are two approaches to assess the evidence in a teaching portfolio for summative purposes, namely the analytic or holistic approach.

The analytic approach entails assessing each aspect of the teaching portfolio separately and then assigning a grade to each aspect that is calculated to obtain a total grade. The total grade is calculated by adding the total for each aspect, whereafter an average is obtained to determine the final mark for the teaching portfolio. The holistic approach assesses the portfolio as whole. Individual entries are not rated separately. When a teaching portfolio is assessed, the focus is on its overall quality with the focal point on each individual piece of work (Apple & Shimo: 2002: 54).

The type of assessment will determine the purpose of the teaching portfolio. Irrespective of the purpose and its assessment, the teaching portfolio is a useful tool to monitor the professional growth of the teacher or the application for first-time employment, promotion or licensure. Various researchers have documented perceptions and attitudes of teachers towards the teaching portfolios.

## **2.8 ATTITUDES AND PERCEPTIONS OF TEACHERS TOWARDS THE TEACHING PORTFOLIO**

Teachers have diverse attitudes and perceptions about the teaching portfolio as an assessment tool. According to The Dictionary Unit for South African English (2002: 69) an attitude is a settled way of thinking or feeling. A perception is a way of regarding, understanding or interpreting something, or intuitive understanding and

insight described as an observation or insight (The Dictionary Unit for South African English, 2002: 864). Various studies have been conducted in the United States of America about the perceptions and attitudes of teachers towards teaching portfolio assessment. Whilst conducting research about these attitudes and perceptions, the researcher realised that many of the studies were about students in educational programmes or pre-service teachers. Few studies were conducted with in-service teachers. The researcher did not find any South African studies about the attitudes and perceptions of teachers towards teaching portfolios. Hence, this study will contribute to this knowledge base.

In a survey conducted at two colleges by Ford & Ohlhausen (1991: 1) about education students' attitudes, beliefs and habits regarding portfolio assessment in ten different graduate courses in literacy education, teachers identified three in-class activities that were helpful in developing a knowledge base. These activities were compiling portfolios, feedback from instructors or lecturers, and discussion of portfolios with peers. Three external activities that were helpful in developing a knowledge base were reading articles in professional publications and continual development of teaching portfolios.

Ninety-one percent of the teachers interviewed in the study by Ford and Ohlhausen (1991: 3) indicated that the inclusion of portfolio assessment in a course helped to change beliefs about assessment. Other responses to assessment included 69% of teachers who agreed that assessment should be anchored in authentic tasks, texts and learning contexts. More than 90% of the student teachers agreed or strongly agreed that assessment should be a continuous, ongoing process, that it should be multidimensional and that the assessment process should provide for active collaboration by teacher and learner.

Initially 75% of the teachers were not using any form of portfolio assessment in the classroom. The majority of teachers who were using portfolios in the classroom, used it as work folders. In the course of the study 12% of teachers who were interviewed indicated that portfolios were not being used. Of the teachers that used teaching portfolios, 3% used it as work folders, 11% used it for the direction and assessment of learners' learning, 21% used it as writing folders and 53% for grading and evaluation

(Ford & Ohlhausen, 1991: 3). Teachers who participated in the study were asked to identify the strengths and weaknesses of portfolio assessment in the classroom. The strengths that were most frequently identified were that portfolio assessment provided a positive indicator of learner growth and assisted teachers to feel more confident about reporting learners' growth to parents. The disadvantage most frequently identified by the teachers was that the teaching portfolio was time-consuming (Ford & Ohlhausen, 1991: 3; Apple & Shimo, 2002: 54).

In the study conducted by Ford & Ohlhausen (1991: 3), 46% of the student teachers indicated that the development of the teaching portfolio was continued after the course had been completed, but on a much smaller scale than in class. This opinion varied from individual to individual. Student teachers noted that the development of the teaching portfolio was continued because enrolment for other courses required a teaching portfolio. A lack of time seemed to be a factor that prevented teachers from proceeding with portfolio development. A positive outcome of the teaching portfolio is that student teachers pursued the personal goals stated in the portfolio, even though the update of the portfolio no longer occurred (Ford & Ohlhausen, 1991: 3). In this study the researchers concluded that teaching portfolios allowed student teachers to reflect upon personal habits as readers and writers, while it involved student teachers in directing, documenting and evaluating their own learning. The study also allowed teaching staff to view themselves as facilitators of learning rather than experts of knowledge. This approach was carried through to the classroom practice of student teachers (Ford & Ohlhausen, 1991: 4). It can be concluded that portfolio assessment had positive effects on teaching practice; the only drawback was that the development of the portfolio was seen as time-consuming (Ford & Ohlhausen, 1991: 3; Apple & Shimo, 2002: 54).

Slater (1997: 316) conducted an investigation in three science classrooms to determine the effectiveness of student portfolio assessment. Slater (1997: 315) stated that the compilation of a portfolio allowed students to organise, synthesise, describe achievements, and effectively communicate or reflect on the knowledge that had been acquired in a particular subject. A negative response indicated that the process of portfolio development was time-consuming, a response supported by Ford & Ohlhausen (1991: 3) and by Apple & Shimo (2002: 54). However, a positive response

was that the portfolio encouraged introspection and a certain degree of self-assessment from the student (Slater, 1997: 315). These skills of introspection and self-assessment can be developed in a teacher who compiles a teaching portfolio. As an overall result of this study, students reported that they all enjoyed the portfolio experience (Slater, 1997: 317).

Slater (1997: 317) reported that the students' perceptions toward portfolio assessment were positive in that it reduced levels of test anxiety. Students admitted that they "froze up" or "forgot everything" when sitting for a test. Slater (1997: 317) stated that researchers linked this response to testing to the actual onset of anxiety or the result of poor performance by students. This reduction in test anxiety was evident in the higher attendance rate in the classroom. Students reported that they enjoyed attending the classes, because the instructors used portfolio assessment as the main assessment tool in the classroom. Students indicated that the pressure of rigorous note-taking was decreased and they were able to focus on the holistic view of physics, not only the formulae taught in the classroom. Portfolio assessment had motivated students to spend time consulting the textbook or lectures until each learning outcome was fully understood by the learners in the classroom. The study could not determine the amount of time students had spent compiling the portfolio. Portfolio assessment encouraged learners to discuss the concepts outside the classroom and to constantly search for appropriate items to be inserted in the portfolio. The study referred to the items inserted in the portfolio as "neat things" (Slater, 1997: 317). The use of this term indicated that students had a positive perception toward portfolio assessment. During the discussion about portfolio assessment, students reported that the knowledge learnt in the course requiring students to prepare a portfolio was remembered for a longer period of time than in courses where rigorous note taking was a practice. Students reported that knowledge was retained because the concepts were internalised while working with it. The principles of each concept were thought through and applied creatively and extensively during the course (Slater, 1997: 317-318).

Slater (1997: 318) states that portfolio assessment procedures allow instructors to review student achievement from a longitudinal and holistic perspective. From this study it appeared that students' learning environment was enhanced when evidence of

abilities and understanding of concepts were documented through the compilation of a portfolio. Therefore a portfolio encourages the student to apply science concepts in real life situations, and to describe these learning experiences as evidence of learning, minimising the concept of rote learning in the classroom. Slater (1997: 318) reported that the results of this study suggested that portfolio assessment procedures enhanced the understanding of concepts and attitudes toward learning and assessment in the college science classroom.

A study conducted by Robinson & Bennett (n.d.: 1) investigated students' attitudes toward portfolio assessment and the importance of attitudes in the teaching and learning environment. They wanted to determine how attitudes influenced motivation and the interrelationship between motivation and learning in the undergraduate course, computer applications. The portfolio compiled by students in this study and the grade obtained made up the entire course grade. After one hundred and eighty-seven students had completed the questionnaire, the results revealed that the students sanctioned the use of portfolio assessment in the course, preferring it to traditional assessment. A study conducted by Apple & Shimo (2002: 54) also indicated that students preferred portfolio assessment to traditional testing. The majority of students believed that portfolio assessment had positive aspects for them over traditional assessment, such as tests. Firstly, portfolio assessment allowed students to improve individual skills, while providing more opportunities to integrate these skills in the classroom. Secondly, portfolio assessment addressed the students' learning needs more successfully than traditional assessment and therefore they acquired more knowledge and skills when compiling a portfolio. Thirdly, portfolio assessment allowed students to better reflect and assess their own learning than in traditional assessment. Fourthly, portfolio assessment allowed learners to work at their own tempo. The amount of work demanded by the compilation of the portfolio equalled that of a course utilising traditional assessment. Fifthly, portfolio assessment could determine the students' ability to carry out the classroom assessments, which enabled students to learn more. Lastly, students believed that portfolio assessment would be advantageous in a job interview (Robinson & Bennett, n.d.: 5-6). Students supported the concept of using portfolios for purposes of assessment as an effective alternative to traditional methods. It supported the belief held by other researchers and practitioners that portfolios used for assessing student learning could lead to self-

reflection and evaluation, critical thinking, motivation, higher cognitive skill development, skills integration and enhanced student performance (Robinson & Bennett, n.d.: 6). These skills are developed by teachers when a teaching portfolio is compiled. Robinson & Bennett (n.d.: 6) indicated that portfolio assessment displayed benefits such as enhanced performance and enthusiasm in the course of their particular study. The view that teaching portfolios were beneficial in terms of improved performance and enthusiasm was confirmed by student responses in a study conducted by Slater (1997: 317).

A study by Apple & Shimo (2002) researched the perceptions of the benefits of portfolio assessment compared to traditional testing. Sixty-one students who enrolled for four-year English writing courses at two separate universities in Japan completed questionnaires for this study (Apple & Shimo, 2002: 53). Besides completing the questionnaire, students had to develop a portfolio with student-selected work, because the portfolio was used as a primary source of assessment, as was the case in Slater's study (1997: 317).

Tests were omitted as a form of assessment in the study by Apple & Shimo (2002: 53). The students in this study perceived the portfolio as a reflection on learning and it also provided cooperative learning opportunities, such as group work. Students perceived the portfolio as a tool for assessment that stretched over a period of time and they enjoyed compiling the portfolio compared to writing traditional tests. Students also perceived that sufficient feedback was given about the work in progress from instructors and peers, which led to opportunities for goal setting and self-assessment. Students remarked that there was a stronger sense of language progress and achievement, because the portfolio demanded more time and effort from the students. Students responded positively to the portfolio by indicating that they preferred it to traditional testing as a tool for assessment. Seven of the sixty-one students had negative comments about the portfolio, stating that it was "time-consuming", "too much work", "complicated" and "difficult". These negative comments are important to portfolio assessment, because it dismisses the perception that portfolios are "easy" (Apple & Shimo, 2002: 54).

In the study by Apple & Shimo (2002: 54) the students' perceptions provided instructors with another tool for offering sufficient, appropriate feedback to students, thereby adding new assessment criteria to the assessment process. The possible assessment criteria that could be added to assess the portfolio include the student's attitude, effort and seriousness toward the portfolio process, the student's revision of feedback and progress, and the student's improvement of skills. Besides benefiting the students, portfolios assist instructors in incorporating cognitive, meta-cognitive and social or affective strategies and skills in the curricula, which will in turn help students to become successful language learners (Apple & Shimo, 2002: 54). Students interviewed for this study had the perception that there was a connection between portfolio development, active learning and autonomy. Apple & Shimo (2002: 55) are of the opinion that motivated students are likely to display an attitude of active learning, taking responsibility and control over the learning process, which again leads to a higher degree of autonomy. Students who display autonomy become successful and motivated. Therefore portfolio assessment can contribute positively to enhanced motivation, active learning and autonomy. Approximately two-thirds of the students strongly agreed that portfolio development promoted active learning. Students stated four reasons for active involvement in learning. Firstly they mentioned the joy of creating and owning the portfolio; secondly, there was a goal awareness; thirdly, individual accountability and fourthly, continuous and extended learning opportunities (Apple & Shimo, 2002: 55).

In terms of the joy of creation and ownership of the portfolio, students appreciated the ownership as an assessment tool, because students could express originality and creativity in constructing the portfolio, as would not be the case in traditional testing. Students were able to make choices and decisions about the evidence to be placed in the portfolio, and thus had to take the responsibility of completing all the tasks undertaken in the course. This led to the next reason for active involvement, which was goal awareness (Apple & Shimo, 2002: 55).

The development of the portfolio encouraged students to be goal-orientated, because there was more awareness of the portfolio submission at the end of a semester. At the same time there was transparency about how the portfolio was linked to the final assessment of the course, which is unclear in an end-of-semester exam. All the in and

out of class activities had to be completed, as it constituted the content for the portfolio at the end of the semester. Failure to complete the tasks, or not managing to do it correctly, meant that a student could not complete the portfolio for submission and the student would not pass the course (Apple & Shimo, 2002: 55). The submission of the portfolio as a final assessment task meant that the student was accountable for the completion of the portfolio.

Since the portfolio contributed to the final assessment of the course, individual accountability was increased among group members participating in collaborative learning activities such as peer reviews that were used in portfolio development. These activities promoted the students' sense of responsibility, because individuals did not want group members to be disadvantaged in the assessment tasks. Therefore individual accountability, the third reason for active involvement in learning, kept students more active in the learning process. Portfolio development has improved active learning in students and encouraged them to continue and extend learning opportunities during the portfolio process (Apple & Shimo, 2002: 56).

Portfolio development also motivated students to develop strategies for independent learning, such as using a dictionary, because students had to work independently of each other. The portfolio requires long-term work and therefore students have to continuously think about learning opportunities to be placed into the portfolio as evidence. It is clear that portfolio development can motivate students because of the enjoyment, responsibility and goal orientation experienced during the process of compiling the portfolio. The portfolio also allows students to develop cognitive skills and meta-cognitive abilities like planning methods for learning, selection of learning materials, monitoring the learning process and the evaluation of progress through the active involvement of learning (Apple & Shimo, 2002: 56). These four reasons for increased active learning could be linked to a teaching portfolio, because creation and ownership, goal awareness, individual accountability and continued and extended learning opportunities are all integrated with the benefits of a teaching portfolio. Therefore, if a teacher becomes involved in developing a teaching portfolio, opportunities arise for the development of his/her cognitive and meta-cognitive abilities.

Students in this study agreed that portfolios offer opportunities that do not arise in traditional testing. The learning process is continuously assessed and feedback is given from peers and instructors, upon which learners can reflect and improve. In this way cooperative learning and motivation are increased. On the other hand, the constraints of portfolio assessment are that firstly it is time-consuming for both the student compiling the portfolio and the instructor who has to assess it. The time consumption of the teaching portfolio is confirmed by Ford & Ohlhausen (1991: 3) and Wray (2007: 1146). Secondly, students must be given clear and concise guidelines about the expectations of the instructor. These directions need to be stated clearly, because some students in the course may be familiar only with traditional testing as an assessment method. As a result they would not be accustomed to setting own learning goals, choosing work to be placed into the portfolio and reflecting upon the chosen evidence, or that of peers. Despite the portfolio's limitations, the benefits of portfolio assessment far outweigh the negative connotations. It can be stated that through portfolio assessment, students enjoy the assessment activities in and out of the classroom, while developing cognitive and meta-cognitive abilities. Portfolio assessment is more than a course grade or percentage mark in a mark book; it is an enjoyable assessment tool that students can reflect upon long after the completion of a course (Apple & Shimo, 2002: 57). It can be deduced that the respondents who participated in the studies conducted by Slater (1997: 317); Shimo & Apple (2002: 54); Robinson & Bennett (n.d.: 5) have concluded that portfolio assessment is favoured above traditional testing.

A qualitative study conducted by Wray (2007) examined the degree to which participation in a focused teacher learning community impacts on the pre-service teachers' understanding and development of a teaching portfolio. The researcher wanted to determine if the participants in the group could attribute the development of a teaching portfolio to professional development. Nine participants in the study were enrolled in the Professional Development School programme of the elementary teacher education programme. The development of a portfolio by student teachers was part of the course prior to this study.

As students reflected upon how portfolio development impacted on overall growth and professional development, the students' attitude toward this aspect was that it

assisted in clarifying and solidifying personal teaching philosophies and strategies. A few of the students indicated that portfolio development assisted in the articulation of the connection between theory and practice. The students' attitude toward theory and practice was that the portfolio had a positive impact on practice teaching stints. It allowed teachers to rethink teaching strategies and teaching activities and its inclusion in the teaching portfolio. Students agreed that the selection and reflection upon the evidence placed in the teaching portfolio have allowed student teachers to link teaching philosophies to teaching strategies. Students indicated that there were lots of discussions about how the portfolio can portray the teacher and how evidence is selected to portray the teacher's image. Students had a positive attitude toward the evidence in the teaching portfolio and the reflection thereof, because it assisted first-time teachers to understand their own knowledge, skills and abilities (Wray, 2007: 1145-1146).

Portfolio development allowed students to revisit learning experiences in explicit and complex methods. In this study a dialogic process existed among the students while the teaching portfolios were being developed. This dialogic process, also called a portfolio-focused teacher-learning community, was the primary form of support and was universally seen as a positive influence during the development of the teaching portfolios for pre-service teachers in this study. There was a positive attitude toward participation in the teacher learning community or the dialogic process, because it assisted in shaping students' understanding about the purpose of the portfolio from a narrow mindset of portfolios only being used for meeting employment goals, to a broader mindset of using the teaching portfolio to fulfil the school or university's goals.

Participation in the teacher learning community provides students with an opportunity to participate in a collaborative portfolio development process. Meeting with peers for a common purpose allows students to realise that the struggle with the compilation of the teaching portfolio is not a lonely process. The collaborative process provides collegial support amongst students, while challenges and uncertainties can be individually and collectively acknowledged. The support found within the group resulted in the students' increased learning and understanding of the portfolio process (Wray, 2007: 1147-1148). Within a group, students can benefit by listening to how

others have made decisions about portfolio compilation and by reviewing peers' portfolios in progress (Wray, 2007: 1150). There was also a feeling of camaraderie among the students that encouraged group members to share commonalities about challenges in the teaching portfolio process, even outside the group setting (Wray, 2007: 1148). Therefore the students displayed a positive attitude toward a collaborative approach to portfolio development.

Wray (2007: 1146, 1149) stated, however, that even though teaching portfolios are beneficial for teacher learning and development, there are challenges or negative aspects to teaching portfolios. Not only are they time-consuming for teachers, but instructions about the type of evidence to be included in the portfolio, its purpose, the assessment criteria and its organisational strategy can be rather vague. These setbacks were also experienced by students in a study conducted by Apple & Shimo (2002: 57). While most of the students in the study indicated that teaching portfolio development was beneficial to professional development, a minimal number of students showed a negative response. They felt that portfolios were time-consuming and did not contribute to professional development or teaching practice. These mixed responses are evident of the complicated nature of teaching portfolios (Wray, 2007: 1146).

Participation in a portfolio-focused teacher learning community with a collaboration approach is a valuable process for teachers. If a teaching portfolio is developed as a learning experience, aspects around teaching practice and strategies can be discussed in a meaningful, personal and professional manner that in turn can contribute to the professional development of the pre-service teachers (Wray, 2007: 1150).

Tigelaar *et al.* (2006: 373) conducted a study whereby five teachers and their personal coaches at the Maastricht medical school were selected to be interviewed about experiences with the teaching portfolio. Teachers were interviewed about the opinions of the enabling and disabling factors and benefits linked to the structure and social interaction incorporated in the portfolio process. Teachers had to structure the teaching portfolio according to the various roles of a teacher, namely their function as a teacher, expert of knowledge, facilitator of learning, organiser and lifelong learner. The teachers acknowledged that insight into the aspects that teachers enjoyed about

teaching and the identification of strengths and areas of improvement were the first perceived benefits of the teaching portfolio. These perceptions were realised by the teachers having to structure the content of the teaching portfolio according to the various roles of the teacher, and the assignments that had to be placed in the portfolio. These two aspects gave teachers an opportunity to analyse teaching performance in a structured and critical manner (Tigelaar *et al.*, 2006: 374, 376).

The second perceived benefit is social interaction. This was perceived as extremely valuable, because sharing experiences, listening to varying viewpoints and receiving feedback from peers allowed teachers to reflect upon their own teaching, and even resulted in improving teaching practice. Teachers were appreciative of the individual coaching that was tailored to each teacher's needs. The coaches allowed teachers to analyse functions of the various roles used in the study and to reflect upon each role from different perspectives. Through coaching, teachers realised clearer and more detailed reflections and plans of action (Tigelaar *et al.*, 2006: 375, 376). There was a positive attitude towards social interaction in the study by Wray (2007: 1147-1148).

Besides the result of perceived benefits in the study by Tigelaar *et al.* (2006: 376), there were disabling and enabling factors; in other words, factors that hinder or aid the development of the teaching portfolio. A disabling factor or hindrance to portfolio development was the detailed prescriptive phrasings of the assignments given to the teachers to be placed in the teaching portfolio. The teachers linked these prescriptive phrasings to the perception of rigidity of structure. There was a perception that the assignments gave too much detail and were too restrictive and directive. The solution to the perception of rigidity is that there should be more flexibility in the type of assignments, while conversation procedures should be open-ended and more opportunities should be given to meet the learning needs of teachers (Tigelaar *et al.*, 2006: 376-377). Another disabling factor is the amount of time the development of the teaching portfolio consumes. Time was consumed by the execution of assignments for the teaching portfolio, reflection on the teaching practice and collecting evidence for the teaching portfolio. Therefore teachers in this study suggested that a teaching portfolio should only be a requirement if the person were aspiring to a teaching career, because the development of the teaching portfolio added to the workload of teachers (Tigelaar *et al.*, 2006: 375–376). Teachers in a study conducted by Attinello,

Lare & Waters (2006: 146) also indicated that the teaching portfolio added to the workload and that more time could be spent on lesson planning instead.

The teachers perceived the various roles of teachers as being helpful for differentiating between teaching activities and the option of choosing a coach, which was an enabling factor or aid to portfolio development in this study. The positive interaction with the coaches could be a result of teachers having to choose a coach and thus the teacher-coach relationship was supportive and satisfying (Tigelaar *et al.*, 2006: 376).

Even though the perception of structure and social interaction of the teaching portfolio was positive, the heterogeneous nature of the teachers' experiences, background, teaching subjects, personalities and reflective abilities may have influenced teachers' perceptions of social interaction and structure and made it difficult to adapt the structure and social interaction to each teacher's needs (Tigelaar *et al.*, 2006: 376). It can be deduced that structure and social interaction are important aspects in developing an effective teaching portfolio by stimulating teachers' reflection and professional development (Tigelaar *et al.*, 2006: 377).

Attinello *et al.* (2006: 137) conducted a descriptive study that explored teacher and administrator perceptions of the value of a portfolio-based appraisal system as an instrument for evaluation and professional growth, the time required by the appraisal process and the effect on teaching practices. Seven hundred and fifty-two teachers and forty-six administrators completed the survey for this study.

The perception of the teaching portfolio being an accurate and comprehensive measure of teacher performance indicated that teachers and administrators responded positively to this question, but questioned the level of accuracy of a teaching portfolio. Administrators were more supportive of this perception than the teachers in this study. However, both parties felt that teaching portfolios did not always reflect all aspects of teaching, for e.g. a poor teacher could compile a good teaching portfolio and vice versa. The teachers and administrators questioned the presentation quality of the portfolio and indicated that a well-presented portfolio does not necessarily suggest good teaching practice (Attinello *et al.*, 2006: 140-141).

Attinello *et al.* (2006: 142) stated that teachers and administrators perceived teaching portfolios as a useful tool for professional growth in that it encouraged self-reflection by teachers on their work. However, this perception was more keenly supported by administrators than by teachers. Xu (2003: 352) agreed with the idea that the teaching portfolio is a valuable tool for professional development. Teachers and administrators believed that the teaching portfolio assisted teachers in the identification of strengths and weaknesses, but administrators were more positive about this perception than teachers (Attinello *et al.*, 2006: 142). Tigelaar *et al.* (2006: 375) also support the perception that the teaching portfolio identifies teachers' strengths and weaknesses.

Teachers and administrators held the opinion that the amount of time spent compiling the teaching portfolio was reasonable. Once again, the administrators were more positive in the perceptions about the amount of time spent on the teaching portfolio. Teachers noted that the amount of work required to compile a teaching portfolio by far exceeded that required by observation. Despite that, teachers and administrators felt that the amount of time spent on teaching portfolios was reasonable, though it remained a point of contention throughout the study. However, teachers indicated that a portfolio required considerably more work than observing a teacher (Attinello *et al.*, 2006: 143-144). In studies conducted by Painter (2001: 33), Tigelaar *et al.* (2006: 376); Wray (2007:1140) about teachers and coaches' experiences with teaching portfolios, the time constraint was also a factor.

Both teachers and administrators supported the perception that the teaching portfolio process encouraged change in teaching practices, with administrators showing more support for this perception than teachers. The key reason for the change occurring in teaching practice was that teachers had the opportunity to reflect upon it with a peer. Administrators noted that teachers reflected upon teaching practice with the aim of changing teaching activities in the classroom (Attinello *et al.*, 2006: 144).

Tigelaar *et al.* (2006: 374-375) conducted a study about the perceived benefits of teaching portfolios, while Attinello *et al.* (2006: 145-146) conducted a similar study. Both studies determined that the first perceived advantage was the reflection aspect of the portfolio process. As this was a compulsory exercise for teachers during the compilation of the teaching portfolio, it was acknowledged and encouraged. Teachers

were required to reflect upon his/her own teaching practice. Administrators stated that the reflective process encouraged teacher collaboration and sharing among peers. The study by Tigelaar *et al.* (2006: 375) also established that feedback from peers allowed teachers to reflect upon their own teaching practice.

A second perceived advantage of teaching portfolios was that it allowed teachers to document achievements and to convey the interest in learning activities that occurred in the classroom to administrators. The communication between teachers and administrators had a positive outcome for the teaching portfolio process. Teachers agreed that the portfolio process was a richer, more in-depth portrait of performance than an observation exercise. Therefore teachers felt that the portfolio development was a more honest process than mere classroom observation. Moreover, it provided a sense of empowerment in terms of professional development, indicating that teachers were able to make decisions about the types of professional development required because the teachers' work was shared with the administrators (Attinello *et al.*, 2006: 146).

Although the portfolio process has obvious advantages, certain disadvantages were also noted. Many teachers and administrators had the perception that the time required for compiling a teaching portfolio was a disadvantage. Teachers mentioned that time could be used more constructively on lesson planning instead of compiling a teaching portfolio. The teachers saw the portfolio as an additional task, increasing the workload. What frustrated the teachers even more is that the administrators did not adequately review the teaching portfolios developed by the teachers. The administrators agreed to this perception and stated that reviewing the portfolios were time-consuming and its value questionable (Attinello *et al.*, 2006: 146).

The questionable accuracy of the teaching portfolio in relation to truly effective teaching was another perceived disadvantage. Teachers noted that ineffective teachers could compile a good portfolio without focusing on reflection and method to improve teaching practice. This might create the perception that a teacher is a good classroom practitioner because the teaching portfolio is well presented, while the latter might have no substance. Administrators, however, reported that they were able to discern

when a teaching portfolio was an inaccurate representation of the activities that occurred in the classroom (Attinello *et al.*, 2006: 146).

The study of Attinello *et al.* (2006: 149) indicated that the teachers and administrators regarded the teaching portfolio as a valuable tool for assessment and teacher performance. It allows teachers to take ownership of his or her professional development by reflecting on classroom practices, implementing changes and engaging in informative conversations with administrators. Even though the teaching portfolio was perceived as a valuable tool, time was a factor of concern in every aspect of the compilation of the teaching portfolio. Time is consumed by reflection, conversation and collecting evidence for the teaching portfolio. Likewise, time is of the essence for administrators to adequately review the content of the teaching portfolio with the teachers, and to discuss with them how it could improve their teaching and learning practices (Attinello *et al.*, 2006: 149).

The attitudes and perceptions that have been researched by various researchers indicate that the teaching portfolio is an important assessment tool in documenting the professional development of a teacher. Besides professional development, aspects such as teaching practice, reflective skills and collaboration with peers are improved with the development of a teaching portfolio. Therefore the concept of the teaching portfolio as an assessment tool should remain an integral part of the teaching profession and of the subject area Consumer Studies.

## **2.9 CONSUMER STUDIES AS A SCHOOL SUBJECT**

In C2005 Home Economics and Needlework and Clothing were phased out, and then renamed before being reintroduced into schools as Consumer Studies, which was more relevant to the resources available to the schools. The subjects of Home Economics and Needlework and Clothing had to be reviewed by the Education ministry, curriculum advisors and teachers to align this subject with the NCS document of the National Education Department and to achieve the critical cross-field outcomes as implemented by SAQA.

### **2.9.1 Defining Consumer Studies**

The subject Consumer Studies focuses on the development of the learner in the areas of skills, values and attitudes in learners. Consumer Studies equips learners to become responsible and informed consumers of clothing, housing, furnishings and household equipment and to use resources optimally and in a sustainable manner. The subject also promotes the application of knowledge and skills in the production of quality entrepreneurial products that will meet consumer needs (Department of Education, 2003a: 9).

### **2.9.2 The purpose of Consumer Studies**

The Department of Education (2003a: 9) states that the purpose of Consumer Studies is to educate learners to be empowered consumers by developing the knowledge, skills and attitudes to:

- Improve the quality of life of individuals, families and communities;
- Use science and technology effectively and critically, showing responsibility towards the environment and the health of others;
- Collect, analyse and critically evaluate information to acquire the skills to be effective consumers;
- Utilise different sources of product information to make consumer decisions using critical and creative thinking;
- Communicate effectively, using visual, symbolic and/or language skills in various modes;
- Recognise environmental concerns and their effect on consumers and producers (e.g. decreasing the supply of natural resources and the excess of waste);
- Understand the impact of inequitable consumption and production on the natural and economic environment;
- Appreciate the mutual benefits of working with others as members of a team or group in investigating issues, solving problems and producing products;
- Develop cultural and aesthetic sensitivity about food, clothing and housing behaviour patterns across a range of social contexts;
- Encourage positive attitudes towards work and empower individuals to become self-reliant through the application of food, clothing, housing and furnishings and entrepreneurial knowledge and skills; and

- Lay the foundation for Higher Education and explore career opportunities in food, clothing, housing and interior design.

(Department of Education, 2003a: 9).

The purpose of the curriculum for Consumer Studies correlates well with the critical cross- field outcomes as adopted by SAQA. The objective of Consumer Studies is to focus on consumers as individuals, families and communities in the areas of food, clothing and furnishings. Therefore learners who take up Consumer Studies as a subject in Grades 10-12 are developed holistically, in other words equipped with skills, knowledge and attitudes for tertiary education or the job market.

### **2.9.3 The content of the Consumer Studies curriculum**

The Consumer Studies learning programmes encompass three areas, namely Food and Nutrition, Clothing and Housing, and Furnishings. The subject of Consumer Studies lays a foundation for consumer education that will help learners to develop into responsible and informed consumers. This type of learning programme will assist in enhancing the quality of life of consumers and promote the economic and social development of South Africans (Department of Education, 2003a: 10).

As a subject, Consumer Studies prepares learners to gain the necessary knowledge, skills, values and attitudes to produce and market food, clothing or furnishing products to satisfy consumer needs (Department of Education, 2003a: 10). These skills can also be used to furnish entrepreneurial opportunities. South Africa's rich cultural heritage and indigenous knowledge should be used as an inspiration to produce and market culturally accepted and consumer-friendly products (Department of Education, 2003a: 10). There are four learning outcomes for Consumer Studies that cover the necessary knowledge, skills, values and attitudes to equip learners holistically. The four learning outcomes will be stated and the scope of the content for each grade will be briefly discussed (Department of Education, 2003a: 10–13).

**Learning outcome 1: Management of the consumer role**

*The learner is able to demonstrate knowledge of responsible consumer practices and to effectively address consumer issues.*

This learning outcome focuses on the rights and responsibilities of consumers, the redress available to consumers through various channels in South Africa, the household budget, marketing practices and aspects of the economic environment impacting on consumers' financial decision-making.

**Grade 10**

By the end of Grade 10, learners who have achieved the minimum competencies for this learning outcome can describe consumer responsibilities and identify the impact of marketing strategies.

**Grade 11**

By the end of Grade 11, learners who have achieved the minimum competencies for this learning outcome can describe consumer policies and practices as they relate to consumer protection, and define the role of the household budget in managing financial resources responsibly.

**Grade 12**

By the end of Grade 12, learners who have achieved the minimum competencies for this learning outcome can act responsibly in the economic environment and evaluate channels for addressing consumer issues.

**Learning outcome 2: Knowledgeable consumer choices**

*The learner is able to make knowledgeable consumer choices about food, clothing, housing and furnishings within a given socio-economic and cultural context.*

This learning outcome focuses on economic, socio-cultural, functional and aesthetic considerations in the choice of food, clothing, housing and furnishings, the food needs of consumers with different types of requirements, design elements and principles as aesthetic considerations in evaluating floor plans and selecting furnishings and clothing and the evaluation of living spaces for accessibility and safety.

## **Grade 10**

By the end of Grade 10, learners who have achieved the minimum competencies for this learning outcome can describe the food and clothing practices of different socio-economic and cultural groups, discover the impact of food choices on health, identify appropriate clothes for different purposes and recognise aspects affecting the choice of housing in different socio-economic and cultural groups.

## **Grade 11**

By the end of Grade 11, learners who have achieved the minimum competencies for this learning outcome can compare their own food intake with nutritional requirements and come to a conclusion, explain basic principles and elements of design related to selection of clothing to meet aesthetic needs, construct a floor and furniture plan to illustrate the principles of functionality and safety in living spaces and explain choices of furnishings and textiles to meet aesthetic needs and functional considerations.

## **Grade 12**

By the end of Grade 12, learners who have achieved the minimum competencies for this learning outcome can describe the guidelines for the prevention of nutritional and food-related diseases and health conditions, investigate and describe current fashion trends and explain the selection of clothing for the world of work. Learners can describe the contractual and financial responsibilities applicable to consumer choices of housing, furniture and equipment using specified criteria, and investigate and report on a consumer issue.

## **Learning Outcome 3: Responsible use of resources**

*The learner is able to demonstrate the consumer responsibility towards the sustainability of the environment, the community and self through the judicious use of resources.*

This learning outcome focuses on the interaction between the consumer and the social, cultural, economic and natural environment, the interaction between available resources and the choice of food, clothing, housing and furnishing, criteria for evaluating food, clothing, housing, furniture and furnishing outlets, safe food-

handling practices and aspects of food spoilage and ergonomic principles in the choice of furniture.

### **Grade 10**

By the end of Grade 10, learners who have achieved the minimum competencies for this learning outcome can explain the use of resources related to the choice of food, clothing, housing and household equipment, identify safe food-handling practices in the home and describe ergonomic principles related to the choice of furniture and household equipment.

### **Grade 11**

By the end of Grade 11, learners who have achieved the minimum competencies for this learning outcome can act responsibly in the community by explaining safety, quality, price and variety as criteria for evaluating of food, clothing and furnishing outlets and describe the effects of pathogenic organisms on the safety of food.

### **Grade 12**

By the end of Grade 12, learners who have achieved the minimum competencies for this learning outcome can contribute towards sustainability of the environment by analysing the impact of the selection and use of food, clothing, household equipment or furnishing on the natural or economic environment and identify a consumer issue or suggest a strategy for addressing an issue.

## **Learning Outcome 4: Production and marketing of food, clothing and soft furnishing products**

*The learner is able to apply knowledge and demonstrate the skills necessary to make or produce quality consumer products and to apply entrepreneurial knowledge and skills to market these products.*

This learning outcome focuses on the application of the theoretical knowledge and practical skills necessary for the small-scale production of food, clothing and furnishings that are marketable and safe for human consumption. Indigenous knowledge, skills, customs and practices should be considered in the creation of these products.

### **Grade 10**

By the end of Grade 10, learners who have achieved the minimum competencies for this learning outcome can describe the theoretical knowledge and basic processes, techniques and skills needed to produce acceptable food, clothing and furnishing products, use processes, techniques, skills and theoretical knowledge correctly, produce acceptable products, adapt processes and workflow to suit small-scale production and calculate the unit price of products.

### **Grade 11**

By the end of Grade 11, learners who have achieved the minimum competencies for this learning outcome can describe the theoretical knowledge and advance processes, techniques and skills applied in the production of acceptable food, clothing and furnishing products, apply knowledge, processes, techniques and skills to the adaptation of recipes to patterns to make them suitable for small-scale production and calculate the production cost of products.

### **Grade 12**

By the end of Grade 12, learners who have achieved the minimum competencies for this learning outcome can describe the theoretical knowledge, applicable processes, techniques and skills used to produce a product, apply the knowledge, processes, techniques and skills to the production of products, work as a member in a production team, compile a production and marketing plan, evaluate the enterprise for sustainability, produce and market products and evaluate the enterprise for sustainable profitability.

It is evident that Consumer Studies is in line with the NCS for Grades 10-12, the critical cross-field outcomes and the developmental outcomes of SAQA. When a learner exits Grade 12 with Consumer Studies as a school subject, the learner would be able to explore entrance into Consumer Studies at HET institutions, enter the job market and explore entrepreneurial opportunities.

#### **2.9.4 Educational opportunities and career links in Consumer Studies**

The knowledge and skills acquired in the GET band in the learning areas of Technology, Natural Sciences, Economic and Management Sciences, Mathematics, Languages and Life Orientation serve as a foundation for learners to progress to Consumer Studies.

In the FET phase, the subjects Business Studies, Economics, Accounting, Agricultural Sciences, Mathematics, Mathematical Literacy, Geography, Design, Life Orientation, Languages and Electrical Technology provide possible linkages with Consumer Studies (Department of Education, 2003a: 10). The integration of subjects with Consumer Studies can occur with Business Studies, e.g. Consumer Studies learners can apply the business plan knowledge in establishing a business, or the principles of Mathematical Literacy can be applied to the costing of menus or a garment in Consumer Studies. Therefore Consumer Studies involves the integration of theory and practical skills that can create self-employment and entrepreneurial opportunities in the areas of food, clothing and furnishings (Department of Education, 2003a: 10).

Consumer Studies provides learners with underpinning knowledge and skills to qualify for programmes in the HET band in the areas of food, nutrition, clothing, textiles, housing and interior design (Department of Education, 2003a: 10). Higher education institutions like the University of the Western Cape have named the degree Human Ecology that has underlying principles of Consumer Studies. The careers that students can enter into on completion of this degree include those of development officers, interdisciplinary community project coordinators, facilitators, community liaison officers, project or programme managers and entrepreneurs (Human Ecology Department, 2007: 3). Higher education institutions around the country have named this degree Consumer Studies or Community Development, depending on its focus at the institution.

#### **2.9.5 Assessment in the Consumer Studies curriculum**

As part of the current South African system, learning experiences are integral to learners' achievement of outcomes. For this to occur, assessment has to take place on

an ongoing basis so that the learners' development can be monitored and nurtured. This is done through continuous assessment (Le Grange & Reddy, 1998: 10).

Continuous assessment was introduced to South African schools in 1995 and formed an integral part of the RNCS and the NCS for Further Education and Training. The transformation of the South African education system by the DoE, from applying only summative assessment to using continuous assessment (CASS), occurred for various reasons. In the first instance, learners spent too much time writing exams, usually at the end of the term, which meant that learners only worked during exam times and not throughout the year. Secondly, CASS would encourage teachers to think and plan teaching methods with assessment in mind. Thirdly, CASS would motivate teachers to provide constructive feedback to learners with the aim of improving learning. Fourthly, CASS would assist with the outcomes-based development of the curriculum. Fifthly, CASS provided learners with multiple opportunities to improve their knowledge and skills and to monitor their progress. In the sixth place, the year marks would provide a more valid reflection of the learners' performance, because it would include formative and summative assessment tasks. Lastly, CASS allows the teacher to meet needs of all learners in the classroom (Siebörger & Macintosh, 2004: 24). With CASS learners have to work consistently. This approach involves assessing learners' knowledge, skills and attitudes according to specific learning outcomes on a regular basis (Le Grange & Reddy, 1998: 37). CASS requires teachers to think about various assessment methods in the course of their teaching to develop the learner holistically.

With the inception of C2005, the subjects of Home Economics and Needlework and Clothing were renamed Consumer Studies. Consumer Studies was aligned to the principles of OBE and therefore Home Economics and Needlework and Clothing were collapsed into one subject, now called Consumer Studies. Assessment in Consumer Studies had to be aligned to the new South African education system of OBE. The South African Department of Education developed and published subject assessment guidelines for all twenty-nine subjects of the NCS. These assessment guidelines must be read with the relevant subject statements and learning programme guidelines (Department of Education, 2007). The subject statements and learning

programme guidelines that will be referred to in this study relate to the subject Consumer Studies.

The subject assessment guidelines were formulated by writing teams that were nominated from the nine provincial education departments and from various teacher unions. The draft copies of the subject assessment guidelines developed by writing teams were sent to various readers who were requested to provide the authors with advice and suggestions for refining these guidelines (Department of Education, 2007). In 2006, the DoE field-tested the subject assessment guidelines and asked for feedback and advice from teachers and subject specialists. The subject assessment guidelines were published in September 2006 and were intended to provide clear guidance about assessment in Grades 10 and 11 from 2007, and in Grade 12 from 2008 guidelines (Department of Education, 2007).

#### ***2.9.5.1 Purpose of the subject assessment guidelines***

The subject assessment guidelines document provides guidelines for assessment in the National Curriculum Statement Grades 10-12 (General). The guidelines must be read in conjunction with the relevant subject statements and the National Senior Certificate, a qualification at Level 4 on the NQF. Together the aim of these two policy documents boils down to: the subject statements and learning programme guidelines and the subject assessment guidelines should assist teachers in their teaching of the National Curriculum Statement. Teachers should utilise every available opportunity to sharpen their assessment skills that relate to both the development and marking of assessment tasks (Department of Education, 2007: 1).

#### **2.9.6 Assessment in the National Curriculum Statement**

Before a teacher could plan appropriate assessment for any activity, the purpose of the assessment needs to be clearly established. The appropriate methods of assessment should be related to the purpose of assessment. The relationship between the purpose and method of assessment would ensure that decisions and conclusions based on assessment are fair and appropriate. In Consumer Studies curriculum learning and assessment are closely related. Assessment assists learners to monitor the value of their own learning, provides information about progress of learning and enables

learners to take control and make decisions about their own learning. Therefore assessment determines whether learning and teaching have achieved the specific learning outcomes. When assessment indicates a lack of achieving the specific learning outcomes, learning and teaching plans have to be revised accordingly (Department of Education, 2003a: 37). There are different types of assessment that can be used to revise learning and teaching plans.

The Department of Education, (2003a: 38) states that there are 4 types of assessment used by teachers in the Consumer Studies curriculum, namely baseline assessment, diagnostic assessment, formative assessment and summative assessment.

#### ***2.9.6.1 Baseline assessment***

Baseline assessment was important for the start of every grade, but could have taken place at the beginning of any learning cycle; that is, it could have taken place at the beginning of a new concept taught in the classroom. The aim of baseline assessment was to establish the knowledge and skills that learners were competent in. It assisted teachers in the planning of activities and in learning programme development. It allowed teachers to determine the starting point of a new lesson or concept. The recording of baseline assessment is informal (Department of Education, 2003a: 38).

#### ***2.9.6.2 Diagnostic assessment***

Diagnostic assessment was used prior to teaching or at the beginning of a lesson that allowed the teacher to ascertain the cause or causes of learning barriers or difficulties, or provided information about future planning (Department of Education, 2003a: 38; Van der Horst & McDonald, 2003: 170).

Diagnostic assessment assisted in deciding on support strategies or identifying the need for professional help or remediation. It acted as a checkpoint to help redefine the learning programme goals, or to discover the learning that has not taken place and therefore allowed the teacher to put intervention strategies in place for learners who required support (Department of Education, 2003a: 38). Van der Horst & McDonald, (2003: 170) state that diagnostic assessment was also used to determine learners'

entry levels about a particular lesson topic. The assessment methods for diagnostic testing might either be informal, such as questions given by teachers to learners, or formal, such as a pre-test that was used to measure a learner's level of knowledge of information that will be taught before the teacher teaches the information to the learners.

The use of formal and informal diagnostic assessment in the planning of a lesson provided the teacher with a complete picture of a learner's readiness for and interest in a teacher's teaching. Diagnostic assessment showed evidence of a learner's pre-knowledge, pre-skills, pre-values and pre-attitudes of a particular topic that was taught by the teacher. Diagnostic assessment did not only have to take place when a new topic was taught. Effective teachers diagnosed learners' interest and understanding throughout each lesson or unit of teaching. An ongoing type of assessment is known as formative assessment, because it assisted in shaping a learner's learning (Van der Horst & McDonald, 2003: 170).

### **2.9.6.3 Formative assessment**

Formative assessment is a vital element of OBE and learning and teaching (Department of Education, 2003a: 38; Van der Horst & McDonald, 2003: 170). Formative assessment took place during the learning process and aimed at assisting learners to grow and progress (Marnewick & Rouhani in Jacobs *et al.*, 2004: 269). It also monitored and supported the learning process (Department of Education, 2003a: 38).

Formative assessment can either take place on an informal basis such as teachers' observations or questions to learners, or on a formal basis such as tests. The results of formative assessment informed teachers and learners about problems, errors, misunderstandings, understandings and progress regarding the content of learning programmes. Formative assessment helped the teacher to adapt learning and teaching strategies during the assessment process in order to promote deeper understanding and learning amongst learners. Formative assessment therefore had a teaching function for both teacher and learner (Van der Horst & McDonald, 2003: 170).

For effective learning and teaching to take place, all forms of assessment should be included in a teacher's collection of assessment methods. In outcomes-based assessment, criterion-based assessment should be added to the more traditional form of norm-referenced assessment, thereby providing a more holistic picture of the learner's progress (Marnewick & Rouhani in Jacobs *et al.*, 2004: 269). It is therefore important that constructive feedback be provided for formative purposes (Department of Education, 2003a: 38).

#### **2.9.6.4 Summative assessment**

Summative assessment gave a clear picture of a learner's competence or progress at any specific moment. Summative assessment took place at the end of a single learning activity, a unit, lesson, cycle, term, semester or year of learning programme (Department of Education, 2003a: 38). It was the final measure of what the learner had learnt and took the form of a test or examination at the end of a school term or year (Van der Horst & McDonald, 2003: 171; Marnewick & Rouhani in Jacobs *et al.*, 2004: 269). This type of assessment was always norm-referenced, which meant that one learner's competence was compared to another learner's competence (Marnewick & Rouhani in Jacobs *et al.*, 2004: 269).

Summative assessment could measure learning outcomes, but its main aim was about how much knowledge the learner could memorise and recall (Van der Horst & McDonald, 2003: 171). Therefore summative assessment in OBE should be well-planned and a variety of assessment instruments and strategies should be used to allow learners to demonstrate competencies in knowledge, skills, values and attitudes (Department of Education, 2003a: 38). When summative assessment is well developed and suited to individual learners, it would provide evidence to the teacher about teaching practices and about learners' learning. Alternative summative assessment could include projects and performance tasks to provide a holistic picture of a learner's learning (Van der Horst & McDonald, 2003: 171). This means that learners must be given ample opportunities to demonstrate to teachers their level of knowledge, skills, values and attitudes.

### **2.9.7 Continuous assessment in Consumer Studies**

Assessment within the traditional education system consisted primarily of competency tests, written tests and examinations where all learners were assessed by measuring them against each other and a memorandum (Olivier, 1998: 3, 47). Learners were passed or failed according to how well knowledge was mastered. In the assessment of outcomes-based learning, learners were assessed against a set of criteria (Olivier, 1998: 47). In OBE, assessment is a continuous activity, because it is based on the assessment of knowledge, skills and values and the achievement of outcomes. In OBE, assessment is an integral part of the learning process as well as a method of monitoring success (Olivier, 1998: 3).

Assessment items developed by teachers should be reliable and valid. It means that teachers' assessments of learners' performances should have a degree of reliability. Teachers' judgments of learners' competencies must be generalised at different times, for different assessment items and by different markers. There should be a degree of validity when a teacher makes judgments about a learner's assessment. This means that judgments should be made on the aspects of learning that are assessed. Each assessment activity cannot be completely valid or reliable in itself; decisions about learners' progress should be based on more than one assessment activity. This is the principle behind CASS (Department of Education, 2003a: 39).

CASS is a strategy that bases its decisions about learning on a variety of assessment activities and events that occurred at different times throughout the learning process. It entails assessment activities of various kinds, and refers to assessment instruments and methods that were used in the course of the year. The different types of CASS activities may include tests, examinations, projects and assignments. All these CASS activities are placed into a learner portfolio constituting different pieces of evidence that learners produce throughout the year. Each subject has its own requirements for the types of CASS activities that should be placed in the portfolio (Department of Education, 2003a: 39). The CASS activities for the Consumer Studies learner portfolio include observation-based, task-based, test-based, self-, peer and group assessments (Department of Education, 2003a: 40-41).

The Western Cape Education Department (2001: 3) states that the benefits of CASS are that firstly it is ongoing, and therefore learners are required to work consistently. This consistent work reinforces the culture of teaching and learning in learners. Secondly, learners are assessed by using a variety and appropriate assessment methods that provide a more valid assessment of learners' performance. Thirdly, assessment occurs in an authentic context that means learners are assessed in a real situation that is vital to the learning process. Fourthly, assessment is fed back into the learning process, thus promoting formative assessment. This implies that the assessment activities for CASS must be linked to the content taught in the classroom. Lastly, the teacher who works closely with the learner is responsible for the assessment of each learner's performance.

CASS has advantages for both teachers and learners. Le Grange & Reddy (1998: 10) indicate that CASS provides feedback about the learning outcomes that learners have or have not achieved, and in turn identifies the strengths and weaknesses of learners. It encourages communication between teachers and learners. The awareness of learners' progress is not limited to one or two tests, but dependent on a variety of assessment tools such as projects, written tasks or research assignments. The learners' learning progress is transparent. Learners are not disadvantaged when they miss tests due to illness and other courses, as was the case in the past. Tests and examinations are not the only forms of assessment that determine a learner's success or failure. Observation-based, self-, peer and group assessment are used to evaluate learners' performance. CASS motivates learners to work hard throughout the year. Using continuous assessment strategies assist learners in correcting weaknesses as learning takes place. In other words, continuous assessment is both formative and summative (Marnewick & Rouhani in Jacobs *et al.*, 2004: 271).

The Department of Education (2007: 7) encourages Consumer Studies teachers to use a variety of assessment activities, methods, tools and forms when practical and theoretical components of Consumer Studies are assessed. The selection of a particular method and instrument for assessment should provide the learner with sufficient opportunities to demonstrate the achievement of one or more of the learning outcomes. Therefore the attainment of the learning outcome would be possible only if

the chosen methods and instruments are appropriate to the grade being taught and the learning outcomes being assessed.

CASS maintains the principles of OBE, stating that assessment should take place on a continuous basis, promote learning, move away from learning as memorising only, cover a wide spectrum of learning activities and tasks, make use of relevant knowledge in real-life contexts and focus on knowledge skills, attitudes and values and not only on content (Western Cape Education Department, 2001: 4).

CASS is a classroom-based and school-based activity and an ongoing process integrated into teaching and learning (Department of Education, 2003a: 39). Assessment in the NCS document is a fundamental part of teaching and learning. For this reason, assessment should be part of every lesson, and teachers should plan assessment activities to complement learning activities. In addition, teachers should plan a formal programme of assessment for one year. The informal daily assessment and the formal programme of assessment should be used to monitor and evaluate learner progress throughout the school year (Department of Education, 2007: 1). Consumer Studies has a practical component where a practical task is required to assess the knowledge, skills, values and attitudes that the learner has acquired during the learning process (Department of Education, 2007: 7).

CASS involves more formative assessment than summative assessment. Formative assessment is the continuous monitoring and assessment of the learner's progress towards achieving the specific outcomes of a particular subject (Le Grange & Reddy, 1998: 10). In Grades 10-12 CASS comprises two different but related activities: informal daily assessment and a formal programme of Assessment. Through informal daily assessment and the formal programme of assessment CASS should be used to develop learners' knowledge, skills and values; assess learners' strengths and weaknesses; provide additional support to learners; revisit or revise certain sections of the curriculum; and motivate and encourage learners (Department of Education, 2007: 1).

### **2.9.7.1 Informal daily assessment**

The daily assessment tasks are the planned learning and teaching activities that take place in the subject classroom. Learner progress should be monitored during learning activities. This informal daily monitoring of progress can be done through question and answer sessions; short assessment tasks completed during the lesson by individuals, pairs or groups, or homework exercises. Individual learners, groups of learners or teachers can mark these assessment tasks. Self-assessment, peer assessment and group assessment actively involve learners in assessment. This is important, as it allows learners to learn from and reflect on their own performance. (Department of Education, 2007: 2).

The results of the informal daily assessment tasks are not formally recorded, unless the teacher desires to do so. In such instances, a simple checklist may be used to record this assessment. However, teachers may use the learners' performance in these assessment tasks to provide verbal or written feedback to learners, the school management team and parents. This is particularly important if barriers to learning or poor levels of participation are encountered. The results of these assessment tasks are not taken into account for promotion and certification purposes (Department of Education, 2007: 2).

In Consumer Studies, daily assessment activities provide learners with opportunities to develop the skills, knowledge, values and attitudes required to complete the tasks in the Programme of Assessment. These assessment activities have to reflect in the teacher's lesson planning and should not be seen as separate entities from the learning activities that take place in the classroom (Department of Education, 2007: 7).

In Consumer Studies not all daily activities are formally recorded, nor are they taken into account for promotion or certification purposes. When assessment activities do not have to be recorded for promotion or certification purposes, the teacher must observe and note the development of learners' knowledge, skills values and attitudes. The teacher must take note of the learners' strengths and weaknesses and provide additional support during these activities. The teacher should choose a variety of daily assessment tasks relevant to the knowledge skills, values and attitudes being

addressed, for example a short test, a drawing, demonstration or entrepreneurial activity (Department of Education, 2007: 7).

### **2.9.7.2 Programme of assessment**

In addition to daily assessment tasks, teachers should develop an annual formal programme of assessment for Grades 10-12 in Consumer Studies. The programme of assessment for Grades 10 and 11 differs from the programme of assessment for Grade 12 (Department of Education, 2007: 2).

In Grade 10-11 the programme of assessment consists of six tasks that have to be completed during the school year, while the seventh task is an end-of-year examination consisting of two parts, namely a practical assessment task and a written theory paper. Other assessment tasks include tests, examinations, a practical assessment task and three other types of assessment tasks that are not to be tests or examinations, but assignments, investigations or projects (Department of Education, 2007: 8-9).

The seventh task, the practical assessment task, consists of three tasks. Each comprises a planning phase, a production phase and an evaluation phase that should be placed in the learner portfolio (Department of Education, 2007: 10).

In Grade 12, the assessment is made up of two components, a programme of assessment and an external assessment. The programme of assessment consists of seven tasks that are internally assessed. These seven tasks include two tests and two examinations, with the other three tasks calling for another form of assessment such as an assignment or investigation or project (Department of Education, 2007: 11).

The external assessment component for Grade 12 consists of two parts, namely a practical assessment task and a written theory paper that was externally set, marked and moderated. The practical assessment task consists of three tasks. Each task comprises a planning phase, a production phase and an evaluation phase. The evidence produced in all three phases of each task must be placed in the learner portfolio. The Grade 10-11 learners also execute this task. The criteria for the practical assessment task are externally set, administered and marked by the school, and externally moderated. At the same time the teacher is expected to set the task and

assess the learner's performance against the set criteria. The assessment tasks outlined in the programme of assessment and an external assessment comprise the annual assessment plan for Grade 12 (Department of Education, 2007: 13-14).

### **2.9.8 Promotion of learners**

Grade 12 is the exit level for school learners and the final stage of the FET phase on the NQF. In Grade 12 learners are considered for promotion or certification into higher education or the job market and they have to achieve at least a level 2 rating, which is an elementary achievement of 30-39% in Consumer Studies. This assessment rule only applies if the learner has acquired at least a level 3 rating, which is a moderate achievement of 40-49% in at least one of the three choice subjects (Department of Education, 2007: 14).

### **2.9.9 Moderation of assessment**

All Grade 10-11 tasks are moderated internally, while Grade 12 tasks are moderated externally. The subject head for Consumer Studies or the head of department for Services at the school manages the moderation process (Department of Education, 2007: 14). During this moderation process all the assessment methods that are used in a programme are verified for fairness, validity, reliability and practicality (Western Cape Education Department, 2001: 6).

### **2.9.10 Methods for collecting assessment evidence**

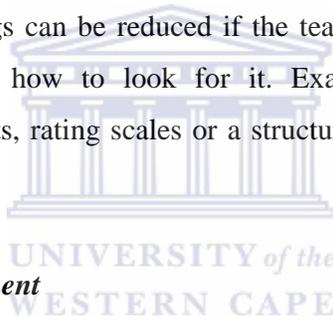
Traditionally the teacher was the only person to assess the learner. In an outcomes-based system there is more than one assessor, which includes the teacher, self- and peer assessment. This means that the CASS process includes judgements made about the learner's performance by the teacher, the learner and other learners (Department of Education, 2003a: 39).

A variety of continuous assessment methods and strategies are employed to provide a comprehensive reflection of the learner's development in all areas. Some of these assessment methods or strategies include journals, project work, portfolios, practical work, essay assignments and reports. The assessment methods to be discussed are the

ones used in the Consumer Studies syllabus compiled by the National Education Department.

#### ***2.9.10.1 Observation-based assessment***

Observation-based assessment methods tend to be less structured and allow the development of a record of different kinds of evidence for different learners at different times. This kind of assessment is often based on tasks that require learners to interact with one another in pursuit of a common solution or product (Department of Education, 2003a: 40). By observing learners at work, an alert teacher is often able not only to construct authentic assessments of learners' work, but also to spot the causes of learners' behaviour or lack of understanding. With this kind of assessment there are a few shortcomings. The teacher could be unreliable and subjective, and learners might behave differently when they know they are going to be observed. However, these shortcomings can be reduced if the teacher has predetermined what he/she is looking for and how to look for it. Examples of observation-based assessment include checklists, rating scales or a structured interview (Van der Horst & McDonald, 2003: 192).



#### ***2.9.10.2 Test-based assessment***

According to the Department of Education (2003a: 40-41) a test-based assessment is more structured, and enables teachers to gather the same evidence for all learners using the same method at the same time. This kind of assessment creates evidence of learning that is verified by a specific score. If used correctly, tests and examinations form an important part of the curriculum, because they give good evidence of whether the learning outcomes of a particular subject have been met.

#### ***2.9.10.3 Task-based assessment***

Task-based or performance-based assessment methods aim to show whether learners can apply the acquired skills and knowledge in unfamiliar contexts. Task-based assessment also covers the practical components of subjects by determining how learners put theory into practice (Department of Education, 2003: 41). This means that learners are engaged in activities that require the demonstration of specific skills or the development of specified products (Van Rensburg in Pretorius, 1998: 86). The assessment criteria by which the task will be assessed can be described in rubrics or

checklists, which will help the teacher to use professional judgement for assessing each learner's performance. According to Van der Horst & McDonald (2003: 199) performance tasks have been called authentic assessment, because they are valuable activities in themselves and involve tasks that are directly related to real world problems. These tasks allow learners to use their knowledge, skills and attitudes in a variety of realistic situations and contexts. They also allow performance-based assessment to be valid and reliable and thus the teacher will know whether or not learners have achieved the learning outcomes. Examples of task-based assessment include demonstrations, development of oral/visual presentations, projects and portfolios (Van der Horst & McDonald, 2003: 200).

#### **2.9.10.4 Self-assessment**

All learning outcomes and assessment standards are transparent and therefore learners know what is expected of them (Department of Education, 2003a: 40). Self-assessment is a checklist or questionnaire completed by a learner, and undertaken after an action, demonstration or oral examination. It is a method of improving learning by passing on skills of evaluation and critical judgement to the learners (University of Pretoria, 2005). Paris & Ayres (1994) in Van der Horst & McDonald (2003: 203) pointed out that self-assessment promotes learners' sense of ownership and responsibility, two critical aspects of literacy development that must be nurtured throughout learners' schooling. This form of assessment can be effective in the selection of exemplary work for compiling a learner portfolio, such as good pieces of written work, project work and assignments.

Teachers are required to ascertain that learners are ready to engage in the process of self-assessment. Teachers can prepare learners to conduct self-assessment activities by involving learners in the selection of assessment criteria for this exercise. This selection would depend on the knowledge, skills, values and attitudes the teacher wants a learner to achieve (Marnewick & Rouhani in Jacobs *et al.*, 2004: 273).

Self-assessment is important, because it assists learners to think critically about their own work and take responsibility for their own learning. If self-assessment is executed correctly, learners will have a good idea about their progress and teachers

will be able to determine the aspects of the work that learners value. Teachers will be able to provide learners with more meaningful feedback. Involving learners in continuous assessment need not be limited to self-assessment. Learners could be asked to assess the work of other learners in their class as peers. This is called peer assessment (Marnewick & Rouhani in Jacobs *et al.*, 2004: 274).

#### **2.9.10.5 Peer assessment**

Marnewick & Rouhani in Jacobs *et al.* (2004: 274) define a peer as someone who is either the same age as another person or in a similar position. For example, learners in the same class at school are peers to each other, or teachers can act as peers to one another (Marnewick & Rouhani in Jacobs *et al.*, 2004: 274). Van der Horst & McDonald (2003: 211) state that peer assessment occurs when learners give their own opinion of their group's performance compared to the outcomes they should have reached. The advantages of peer assessment are that firstly, if learners are involved in the assessment process, they do not feel threatened and are more likely to learn from it (Van der Horst & McDonald, 2003: 211). Secondly, peer assessment is a more transparent form of assessment, as it involves more than one person. Thirdly, learners are encouraged to assist each other in peer activities (Marnewick & Rouhani in Jacobs *et al.*, 2004: 275). Assistance with peer activities was not encouraged in the traditional education system, because it was considered as copying.

The disadvantages of peer assessment are firstly that it is time-consuming at the beginning, because teachers need to carefully explain the assessment activities to the learners, as well as moderating the assessment by peers. Secondly, it takes learners a period of time, approximately one year, to gain sufficient experience to successfully peer assess one another (Marnewick & Rouhani in Jacobs *et al.*, 2004: 275).

When learners are assessing one another, they should be taught to provide positive, constructive appraisal of group and peer work. It thus enables learners to think critically about their own work and that of their peers (University of Pretoria, 2005). However, the teacher should provide the learners with clear learning outcomes about what is to be assessed, to avoid unnecessary criticism. Therefore it is essential that the teacher develop clear guidelines about giving feedback to peers (University of

Pretoria, 2005). Peer assessment can be used for group projects and oral presentations (Department of Education, 1997: 30 in Van Rensburg in Pretorius, 1998: 88).

Self- and peer assessment help learners to become critical about their own work and this in turn provides a structure for discussion about the quality of work being presented. It enables learners to develop their learning and assessment skills while engaging with the work, and not after the assessment process has been completed. It also assists learners in understanding the subjective nature of judgements in assessment in many arenas, which can only be substantiated by reference to other assessments previously completed by the learner. Self- and peer assessment can be used as evidence of standards of engagement in the process of assessment (University of Pretoria, 2005).

#### **2.9.10.6 Group assessment**

The ability to work effectively in groups is one of the critical cross-field outcomes. Good group work is generally based around a task that needs to be completed. This task will be problem-based and linked to the content knowledge of a particular learning area (Criticos, Long, Moletsane & Mthiyane, 2004: 104). In most cases the product of the group should be assessed. Assessing group work involves looking for evidence that the learners in the group cooperate, assist one another, divide work and combine individual contributions into a single composite assessable product (Department of Education, 2003a: 40). Group assessment looks at process as well as product. It involves assessing social skills, time management, resource management and group dynamics, as well as the output of the group (Department of Education, 2003a: 40). Criticos *et al.* (2004: 104) state that the key element in assessing group work is that the groups must timeously know the assessment criteria used to assess them. This will sharpen their focus and efforts and reduce feelings of unfair treatment (Criticos *et al.*, 2004: 104).

Peer, self- and group assessment encourage a sense of ownership of the assessment process and allows learners to be committed to the outcomes. It also develops a range of transferable skills that are valuable to students during their education and which they can apply in their employment. These skills could include critical thinking,

conflict management and working in a team. It facilitates lifelong learning. It helps learners to become autonomous in that they are better able to recognise strengths and weaknesses in their own work. Peer, self- and group assessment allow assessment to become part of the learning process, rather than being seen as separate from learning. It encourages deep rather than surface learning, so that superficial attempts to regurgitate information are replaced by a bigger commitment to understanding and applying information (University of Pretoria, 2005).

#### ***2.9.10.7 Learner portfolio assessment***

Van der Horst & McDonald (2003: 195) state that a portfolio is a file or folder that contains samples of a learner's work, such as themes, homework, teacher's rating on the work completed, descriptions of a learner's accomplishments, tests with allocated marks and other significant materials collected by the learner in the course of the term. The Western Cape Education Department (2001: 8) states that a learner's portfolio must contain every piece of evidence that is used to calculate the learner's CASS mark. Therefore the learner portfolio provides evidence of a learner's knowledge, skills, values, attitudes and academic development, which in turn provides the teacher with opportunities for formative and summative evaluation (Van der Horst & McDonald, 2003: 195).

The work in the portfolio must have a clear intent and purpose that is linked to the learning programme outcomes (Van Rensburg in Pretorius 1998: 86). Before learners embark on the development of a learner portfolio, the teacher should explain the purpose of the portfolio so that learners can stay focused on the purpose. Le Grange & Reddy (1998: 23) state that a learner should at times be given the responsibility of selecting the work to be represented in the portfolio. Sometimes the teacher must select the work, and on other occasions the teacher and learner can select pieces of work together. Assessment of the work selected for the portfolio has to be teacher assessed as well as self-assessed.

Learner portfolios offer a concrete way for learners to learn the skill of assessing their own work. When given the responsibility of selecting work for the portfolio, learners are obliged to examine their work from new perspectives. Learners are encouraged to utilise multiple criteria for evaluation, for example scrutinising work in terms of effort

expended, quality produced and satisfaction with the final product. The active participation in a learner's own learning allows for a stronger sense of ownership of work and the development towards the outcomes that is to be achieved (Le Grange & Reddy, 1998: 23). The role of the teacher is to monitor a learner's progress whilst developing the learner portfolio, and not to interfere with a learner's creativity (Marnewick & Rouhani in Jacobs *et al.*, 2004: 304).

The portfolio monitors a learner's progress by means of a variety of assessments throughout the year. Boschee & Baron (1993) in Van der Horst & McDonald (2003: 197) suggest examples of various types of assessments that could be included in a portfolio, such as test results, projects, essays, journal pages and entries, records of learners' appraisal, sketches and drawings, evidence of knowledge acquisition and skills development in specific content areas, indicators of learners' growth, evidence of progress toward achievement of specific learning outcomes and observational records. Van der Horst & McDonald (2003: 195) argue that portfolios have the potential to improve both learning and teaching, because the teacher and learner are required to engage in reflective self-evaluation. Portfolios can accomplish the alignment of the curriculum, instruction and assessment that other assessment strategies can seldom achieve (Van der Horst & McDonald, 2003: 195).

The purpose of the portfolio as an authentic tool is to assess learners' achievement of the learning outcomes, assess the quality of learners' work on a continuous basis, allow learners to use special interests and abilities in the development of the learner portfolio, and encourage the development of personal qualities (such as pride in workmanship) in each learner, as well as the ability to self-assess and the ability to accomplish significant tasks. The learner portfolio allows learners to determine weaknesses and improve on it. The collection of work in the learner portfolio could at a later stage be used for application in further education or employment in the workplace (Van der Horst & McDonald, 2003: 195-196).

During the year, the teacher has to assess the learner portfolio. Algonquin College (1995: 4) in Van der Horst & McDonald (2003: 306) provided six steps that assisted teachers in assessing the learner portfolio. In Step 1 the teacher had to read through the portfolio to gain an overall view. In Step 2 the teacher considered the

appropriateness of the learner's work contained in the portfolio. Step 3 compared the learner's achievements with the outcomes of the subject and the assessment standards. In step 4 the teacher made a tentative judgement about the learner portfolio based on the learning process that included the learning outcomes, teaching methods, learner activities, learning content and assessment activities. In Step 5 the teacher had a conversation with the learner to obtain clarification and information about the portfolio produced by the learner. In Step 6 the teacher assigned a comment and mark to the learning portfolio. The WCED has not yet developed the assessment criteria for developing a learner portfolio.

The emphasis is on the learner developing skills, knowledge and values that are in line with Bloom's taxonomy. To ensure that teachers develop learners in all areas each year, teachers undergo a moderation process requiring them to produce a teaching portfolio documenting all the assessment activities that learners had to undertake in a particular year. The aim of the study was to determine the attitudinal perceptions and factors that influence the implementation of a teaching portfolio.

## **2.10 CONCLUSION**

The literature review aimed to give an overview of the context of this study, namely the South African education landscape, OBE, Consumer Studies as a school subject and the teaching portfolio as an assessment tool.

The first area of discussion was the South African landscape that focused on the transformation of education from the Apartheid era to South Africa's democratic dispensation. Key areas of discussion included the role and effect of the National Qualifications Framework, the structure of the national education department, provincial education department and the National Curriculum Statement. The education system prior to 1994 was briefly discussed.

The second area of discussion focused on aspects of OBE, specifically the various teaching models that underpinned OBE, principles and features of OBE and the curriculum development process of OBE.

The third area of focus was Consumer Studies as a school subject, being the learning area in which this study took place. The aspects of Consumer Studies that were discussed included the purpose of Consumer Studies, assessment in the Consumer Studies curriculum with specific reference to assessment methods used in the NCS, and assessment methods used to collect evidence.

The final focus area was the teaching portfolio as an assessment tool. The main points of discussion were the factors that included skills, activities and benefits, as well as the attitudes and perceptions that affected the development of the teaching portfolio. The following chapter will describe the research methodology used in this study.



# **CHAPTER THREE**

## **RESEARCH METHODOLOGY**

### **3.1 INTRODUCTION**

The purpose of this chapter is to focus on the various stages of the quantitative research methodology used in this study. It will present and discuss the research design, the population, the research instruments, the procedure of obtaining the data and the different statistics used to analyse the data.

### **3.2 RESEARCH DESIGN**

The research design applied in this study was an analytical survey research method. Leedy (1997: 191) defines the descriptive survey as a research method where data is essentially quantitative in nature and analysed by means of statistics, so that the researcher may infer certain meanings which lie hidden within the data. Alternatively, it allows the researcher to discern the presence of certain potentials and dynamic forces which may indicate areas that warrant further investigation. In the analytical survey, the concern is primarily with problems of estimation and the testing of statistically based hypotheses. The research design will be aligned with the research questions stated in chapter one.

### **3.3 THE POPULATION**

Hinton (2004: 48) defines a population as a complete set of individuals or items that a researcher wishes to study in a particular category. The population used in this study consisted of all the Consumer Studies educators of the seven EMDCs in the Western Cape Education Department. (See Table 3.1). In each EMDC there were a specific number of schools that were grouped according to their location in the Western Cape. The EMDCs are grouped into Metropole North, East, Central, South Helderberg, South Western and West Coast/Winlands. The North, East, Central and South EMDCs are located in the metropolitan region or urban areas of Cape Town and Helderberg, while the South Western and West Coast/Winlands EMDCs are located in the rural areas of the Western Cape ([www.wced.gov.za](http://www.wced.gov.za)). The researcher consulted the subject advisors for Consumer Studies at each EMDC to ascertain which schools in the EMDC offer Consumer Studies as a school subject. The schools are grouped in

EMDCs according to their location, so that schools in close proximity to one another are served by the same EMDC. The number of Consumer Studies teachers in each EMDC is as follows, as indicated in Table 3.1.

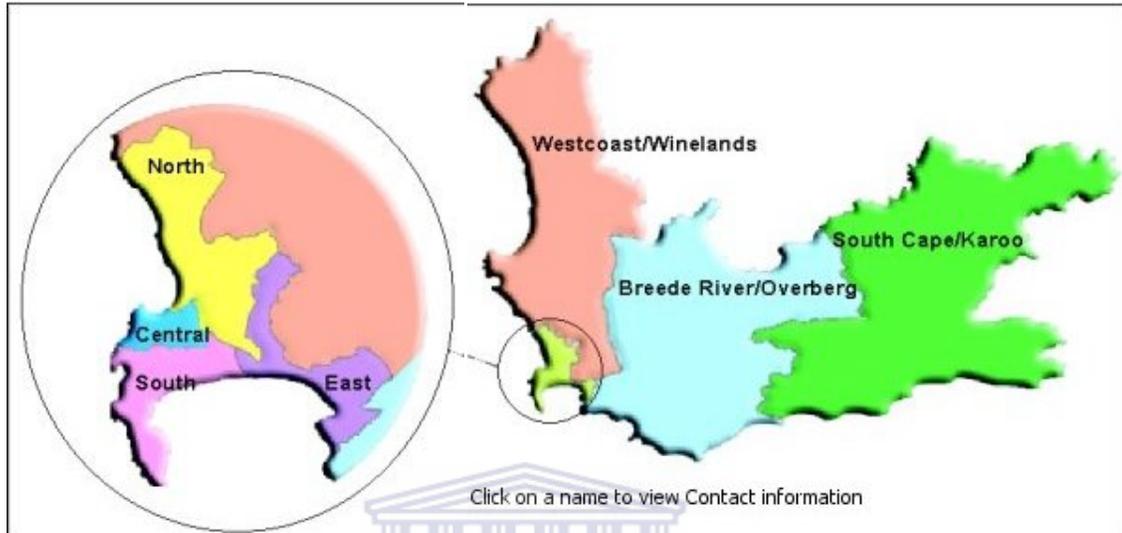


Figure 3.1: Education Districts: Education Management and Development Centres (EMDCs)

Table 3.1: Total of Consumer Studies teachers in the Western Cape Education Department

<b>Educational Management Development Centre</b>	<b>Number of Consumer Studies educators</b>
<b>Breede River/Overberg</b>	<b>32</b>
<b>Central</b>	<b>30</b>
<b>East</b>	<b>37</b>
<b>North</b>	<b>45</b>
<b>South</b>	<b>40</b>
<b>South Cape/Karoo</b>	<b>34</b>
<b>West Coast/Winelands</b>	<b>30</b>
<b>Total</b>	<b>248</b>

### **3.4 RESEARCH INSTRUMENT**

The instrument used to collect the quantitative and demographic data was a questionnaire, adapted from a questionnaire designed by Gordon (1998). When the researcher adapted the questionnaire to the South African context, the methods of assessment had to be adjusted to suit those applied in the Consumer Studies curriculum.

The questionnaire comprised three sections. Section A of the questionnaire focused on the demographics of the participants, including gender, age, the EMDC where the school was located, the crude composition of Consumer Studies learners at the schools and the qualifications of the educators.

Section B of the questionnaire consisted of three parts. Part one addressed the various factors that influenced the selection of assessment methods. The rating scale was ranked from 1 = of no use, 2 = of limited use, 3 = of much use to 4 = of considerable use. In Part two of the questionnaire, respondents had to rate the attitude towards the assessment process using the scale 1 = extremely negative, 2 = very negative, 3 = negative, 4 = positive, 5 = very positive and 6 = extremely positive. Part two measured attitudes towards the assessment process using a semantic differential scale. The scale comprised nine bipolar adjectives that described the assessment process. These adjectives included worthless – valuable, unsuccessful – successful, inefficient – efficient, unimportant – important, bad – good, unfair – fair, disreputable – reputable, rigid – flexible and tense – relaxed. The 6-point Likert scale was used for each pair of adjectives ranging from “extremely negative” to “extremely positive”. Respondents were required to use the scale for each pair of adjectives to describe their attitudes towards the assessment process.

In Part three of the questionnaire respondents had to rate the constraints or barriers that impacted on the assessment process using the scale 1 = strongly disagree, 2 = disagree, 3 = agree and 4 = strongly agree. In each case the strength of the ordinal scale was ranked from the most negative response to the most positive response. In Part three, nine statements were used to measure the teachers’ perceptions of constraints or barriers that impacted on the assessment process. The constraints

included: the educator decides on assessment methods used in the assessment process, planning time, equipment, quality published assessment materials, funds for purchasing published assessment materials, educator courses were of little help, in-service activities helped develop assessment skills, assistance in preparing student assessment activities, and no information about published assessment materials provided.

Section C of the questionnaire comprised three questions. In the first question the educators were asked to identify the skills that would be required for compiling a teaching portfolio. The skills identified in the literature included: journal writing, goal setting, self-assessment, self-reflection, presentation skills and critical thinking. In the second question, educators had to indicate if the teaching portfolio created an opportunity to reconsider the following activities: personal teaching outcomes, teaching methods used in the classroom, assessment methods used to assess learners, and professional growth, and whether their beliefs about teaching and learning reflected their actions as an educator. These activities were identified in the literature. Question three required the educators to name the benefits of the teaching portfolio. The benefits, as indicated in the literature and placed in the questionnaire, were: to assess the strengths and weaknesses of the educator, to reinforce instruction and learning, makes evaluation more meaningful, assists educators in developing teaching and career goals, promotes creativity and self-expression of the educator and encourages critical thinking.

### **3.4.1 The pilot study**

The researcher conducted a pilot study with fourth year Human Ecology education students. At the time these students were being trained as Consumer Studies educators and they were familiar with the content of the Consumer Studies curriculum. The students were unclear about how the questions related to the factors influencing the selection of assessment methods and about rating their attitude toward the assessment process. Once the researcher had explained the questions to the students, they understood what was expected from them. The researcher realised that the questionnaire would have to be explained to the subject advisors and educators. This was executed during the data collection period.

### **3.4.2 Administration of the research instrument**

To conduct this research in the Western Cape, permission was required from the Research Department of the Western Cape Education Department. A letter of permission, together with the questionnaire, was forwarded to the Director: Education (See Appendix 2). The Research Department approved the request (See Appendix 3). Consumer Studies letters (See Appendix 2), accompanied by a copy of the questionnaire, were sent to the research department to request consent for involving Consumer Studies educators in this research. After consent from Western Cape Education Department had been obtained, the Western Cape Education Department moderation process was used to collect the data.

### **3.4.3 Moderation**

All Consumer Studies educators are subjected to a moderation process on an annual basis. Moderation is defined by Department of Education (2005b: 27) as “the process of verifying results of school-based assessment and the external assessment”. According to the Western Cape Education Department (2001: 6), moderation needs to be part of the school assessment policy, because each school should have a moderation policy following the assessment principles of ensuring validity, reliability, fairness and practicability. Internal moderation must ensure that the school-based assessment is consistent, accurate and well designed. Transparency in the moderation methods used is of the utmost importance.

The questionnaires were handed out at the final cluster meeting in October 2005 at the Educational Management Development Centre (EMDC), or at the final meeting where all the educators from the EMDC were present. The researcher was able to visit the Breede River/Overberg, Central and Metropole North EMDC. In some cases the researcher had to attend the EMDC meeting at the beginning of 2006, because the educators had already held their last meeting in the EMDC in 2005. At the EMDC meetings where the subject advisor explained the purpose of the researcher’s visit to the educators, the researcher met with more cooperation regarding the completion of the questionnaires. At the meetings where the researcher had to explain the purpose of the visit to the educators, there was some reluctance to complete the questionnaire. When the researcher visited the educators in October 2005, they were tired and more

concerned about progressing with the meeting than completing the questionnaire. In the case when questionnaires were completed at the beginning of the year, the researcher noticed that the educators were more interested in obtaining feedback from the previous year's home economics Grade 12 exam results and the exam paper. The researcher observed that the educators had a negative attitude towards completing the questionnaire, and felt that it took too long to fill in. The researcher constantly had to motivate the educators to complete the questionnaire.

The researcher was unable to visit the Metropole East and South, South Cape/Karoo and Winelands/West Coast EMDCs and had to explain the questionnaire telephonically to the subject advisors. In the case of the South Cape/Karoo and Winelands/West Coast, the areas were too far to reach. The subject advisors in the Metropole East and South EMDC agreed to have the questionnaires explained to them by the researcher prior to participating in the survey. The subject advisors in the East and South EMDCs had met with the educators and were to see them in their cluster meetings only. Once all the questionnaires had been collected, the researcher observed that certain respondents did not completely understand Section B: parts 1 and 2. The reason could be that the educators felt confused or unsure about how to answer these questions. This occurred even though the questionnaire had been explained to the educators. As a consequence the statistical analysis contains a complete as well as an incomplete data set. Statistical techniques were used to take the incomplete data into account.

The different methods of moderation comprise internal moderation, face moderation, external moderation, cluster moderation and provincial moderation. For the purposes of this study, cluster moderation will be discussed, as this is where the researcher collected the data for the study.

#### ***3.4.3.1 Cluster moderation***

A cluster consists of a group of schools (up to a maximum of ten) located relatively close to one another. The number of learners in Grade twelve is taken into account when drawing up a cluster, the responsibility of which rests with the chief curriculum advisor in each EMDC. One school is appointed as the coordinator for each cluster and a person from this school sets the date, time and venue of the cluster moderation

meeting. Cluster groups consist of educators who teach the same subject at Grade twelve level, in this case Consumer Studies, and who meet on a regular basis to support one another, to share experiences and to ensure that standardisation of CASS is observed. Cluster groups form an extremely important part of the CASS process (Western Cape Education Department, 2001: 29).

The Western Cape Education Department (2001: 29) states that the purpose of the cluster groups is to provide educator development, develop subject support for educators, monitor progress in portfolio work, ensure standardisation of the moderation process, build capacity and develop the necessary material for educators. Cluster meetings are held during the year so that all details regarding the methods of assessment to be used are known and agreed upon before individual educators commence their evaluation. Educators constituting a cluster will be able to create a shared understanding of standards and assessment requirements in a collegial situation.

#### ***3.4.3.2 Evidence required for moderation***

Two types of portfolios are required for the moderation process. They are the educator's or teaching portfolio and the learner's portfolio. According to the Western Cape Education Department, (2001: 8), the teaching portfolio contains all the instructions, assessment criteria and rubrics pertaining to all the CASS tasks set for the learners. The learner's portfolio contains every piece of evidence that is used to calculate the learner's CASS mark (Western Cape Education Department, 2001: 8) For the purpose of this study, the teaching portfolio as an assessment was the focus.

#### ***3.4.3.3 Portfolio presentation***

As these portfolios are merely collections of evidence of work, the nature of the portfolio itself is not as important, as long as it is a neat presentation of the required work. Examples of a portfolio could either consist of stapled cardboard sheets, sealed A4 envelopes with the top cut off, or a flip file (Western Cape Education Department, 2001: 8).

A covering letter accompanying each questionnaire explained the purpose of the study, assured the educators' individual anonymity and requested cooperation from the educators. The structured questionnaire was given to the subject advisors to be handed out to the educators at the cluster moderation meetings. At these sessions educators congregate to discuss work done during the year. In certain instances the researcher had to administer the data collection process, because some of the EMDCs had already held their last cluster moderation meeting for the year. As a result, the researcher had to visit schools where educators met in their study groups. In some instances this was unsuccessful, as educators were not eager to fill in the questionnaire, especially if the subject advisor was absent. On certain occasions the researcher had to attend a cluster moderation meeting to explain to the educators how to complete the questionnaire.

### **3.5 DATA ANALYSIS**

The SAS statistical package, which is a software package for statistical analysis of data, was used to analyse the raw data of the present study. The analysis of the data for the questionnaire was done using the following statistics.

1. For descriptive purposes, frequencies were calculated for all independent variables:
  - Age of teachers
  - Gender of teachers
  - Educator's qualifications
  - Factors that influence the selection of assessment methods for the Consumer Studies teaching portfolio.
  - Teachers' attitudes toward the Consumer Studies teaching portfolio as an assessment tool.
  - Perceptions of Consumer Studies teachers of the assessment methods in the teaching portfolio.
  - Factors that affect the development of the Consumer Studies teaching portfolio.
2. Frequencies providing a basic description of the all the variables.

#### **3.5.1 Non-parametric tests**

In this study non-parametric tests were used for analysis, because the data is not on an interval as is the case for parametric tests. Non-parametric tests do not make this assumption about the scale of measurement or any assumptions about the underlying distributions (Allan, 1982: 219; Hinton, 2004: 210). Allan (1982: 219) states that for this reason non-parametric tests are also called distribution-free tests, which implies that the distribution of the data is of no consequence. For non-parametric tests, calculations cannot be performed on the raw data and the actual values cannot be used in the analysis, because the non-parametric techniques are more concerned with the relative size of the observations or data than with their absolute size. Therefore the data is placed in rank order and an assessment is made on the basis of the ranks rather than on the actual data (Allan, 1982: 219; Hinton, 2004: 210-211).

It can be assumed that the results produced in the rating scale allow the data to be rank ordered. In this study various rank orders were used. The respondents had to rate the factors influencing the selection of an assessment method that meant the assessment method was either 1 = of no use, 2 = of limited use, 3 = of much use or 4 = of considerable use.

A second rating scale was used where respondents had to rate their attitude towards the assessment process, which was 1 = extremely negative, 2 = very negative, 3 = negative, 4 = positive, 5 = very positive and 6 = extremely positive. A third rating scale was used to determine the perceived constraints or barriers that impacted on the assessment process, using a scale that ranged from 1 = strongly disagree, 2 = disagree, 3 = agree to 4 = strongly agree. These ratings are ordinal data, because it placed the responses of the respondents in a specific order.

Essentially, all non-parametric analyses compare the ranks obtained in the different conditions of the independent variable. Various non-parametric tests could be used to analyse data. For the purposes of this study Friedman's test was used.

### 3.5.1.1 *Friedman's test*

Hinton (2004: 240) states that Friedman's test is a non-parametric test that is performed when it is not possible to make assumptions for the parametric one factor repeated measures ANOVA, which is the case for this study. In this test the analysis is performed on rank data, because this data consists of repeated measures and the scores are ranked within each subject rather than across all the scores. The same respondent ranked all the questions in the questionnaire.

Noether (1971: 151) states that Friedman's test is often used to solve a problem known as the problem of  $n$  rankings. In this problem the  $n$  persons are sometimes referred to as judges and asked to rank  $k$  objects (like contestants for a prize, brands for consumer goods) in order of preference. In the study under consideration the  $n$  persons refer to the educators. The  $k$  objects refer to the factors that influence the selection of an assessment method which the educators had to rank from 1 = of no use, 2 = of limited use, 3 = of much use, to 4 = of considerable use.

The educators also had to rank their attitude towards the assessment process, the rank order being 1 = extremely negative, 2 = very negative, 3 = negative, 4 = positive, 5 = very positive and 6 = extremely positive. Lastly the educators had to rank the constraints or barriers that impacted on the assessment process. The rating scale ranked from 1 = strongly disagree, 2 = disagree, 3 = agree, to 4 = strongly agree. Thus there are three  $k$  factors in this study.

Noether (1971: 151) states that the purpose of Friedman's test is to determine if there is some degree of agreement among the  $n$  judges with respect to their order of preference to a particular object. In this study the researcher wanted to see if educators preferred any of the factors for a particular assessment method. In other words, the Friedman  $\chi^2_r$  is used for testing the significant difference between the various treatments (Page, 1963: 226). Therefore the researcher determined if there were any significant differences among the various factors used to influence the selection of the assessment methods applied in the Consumer Studies teaching portfolio. Friedman's test was performed on the complete data set and associations between the various factors were examined by using this test.

Friedman's test considers the missing data in the sample, which was the case in this study. With one-way repeated measure ANOVA  $F$  is calculated, but Friedman's test is a chi-square on the rank data. In the method for calculating Friedman's test, Hinton (2004: 244) stated that when the data is displayed for Friedman's test, the subjects are displayed as rows and the conditions as columns. The data in this study was displayed in this way. Larsen & Marx (1990: 708) state that Friedman's test is a way of analysing randomised block data without making the usual normality assumption. Meddis (1984: 83) also states that Friedman's test deals with many-sample, multiple-block designs.

### **3.5.2 Pairwise comparison**

Paired data experiments try to compare the effect of treatment X with the effect of treatment Y (Larsen & Marx, 1990: 47). In this study the various factors that influenced the selection of an assessment method were compared to see which factors respondents associated with one another. The pairwise comparison was conducted to make the analysis more efficient.

The researcher wanted to establish if educators preferred any of the factors for a particular assessment method. As a result, post-hoc tests had to be performed on the data. These post-hoc tests are called multiple comparison tests, as it allows for various comparisons to be undertaken between the conditions. The problem with multiple comparisons is that the more comparisons are made using the same data, the bigger the risk becomes of making at least one Type I error. This means that when multiple tests on data are undertaken, there is an increased risk of finding differences by chance. The solution is to find a post-hoc test that takes account of this increased risk and controls it (Hinton, 2004: 138). Of the many multiple comparison tests, the one used in this study was Friedman's test for pairwise comparison. The pairwise comparison for each assessment method will be discussed in Chapter 4.

Once the pairwise comparisons had been completed by the SAS programme, the probability or significance between the factors was determined.

### **3.6 VALIDITY AND RELIABILITY**

The instrument used in this study was a standardized questionnaire that was standardised via content and face validity and it was piloted with fourth year Consumer Studies education students to check for the South African context. It was also discussed with Professor Richard Madsen to check for internal consistencies of the scales in the instrument and the values that was reported in the document that the instrument was used from was deemed to be in order.

In Chapter 4 the results will be presented and discussed.



# CHAPTER FOUR

## RESULTS AND DISCUSSION

### 4.1 INTRODUCTION

This chapter illustrates the results of the research instrument and is followed by a discussion of the results. Frequency tables, graphs and inferential statistics applicable to the study were used to explain the results.

The number of respondents varied from question to question. The researcher observed that there might have been a language barrier; since English was a second or third language to certain teachers. Another possibility is that the questions were not fully understood by all respondents.

The aim of this chapter is to present the results obtained from this quantitative survey. The data was analysed in order to:

1. Determine the factors that influence the selection of an assessment method for the Consumer Studies teaching portfolio.
2. Determine the teachers' attitudes towards the assessment process when developing a Consumer Studies teaching portfolio.
3. Describe teachers' perceptions of the constraints of the assessment process.
4. Identify factors that affect the development of the Consumer Studies teaching portfolio.

The measuring instrument used to source the demographic and quantitative data for this study was a structured questionnaire. The results for this study will be presented per objective.

## 4.2 DEMOGRAPHICS OF THE CONSUMER STUDIES TEACHERS

### 4.2.1 Gender of teachers

Table 4.1: Gender of teachers

	N	%
<b>Male</b>	5	3.6
<b>Female</b>	137	96.4
<b>Total</b>	<b>142</b>	<b>100</b>
<b>Missing data</b>	3	
<b>Total sample size</b>	<b>145</b>	

Table 4.1 shows that 142 respondents answered the variable “gender”. Five respondents were male and 137 were female. Figure 4.2 indicates the distribution of gender across the teachers. There were more females than males due to the gendered nature of Consumer Studies. At the turn of the 20<sup>th</sup> century Consumer Studies was practised in such a way that careers in this field focused predominately on women (Stage & Vincenti, 1997). However, men also study Consumer Studies education. In 1998, 2 male Consumer Studies teachers graduated from the Human Ecology department at the University of the Western Cape (Human Ecology and Dietetics Department, 1998: 1). The distribution of male Consumer Studies teachers is lower than that of female Consumer Studies teachers, because Consumer Studies is a relatively new field of study among males.

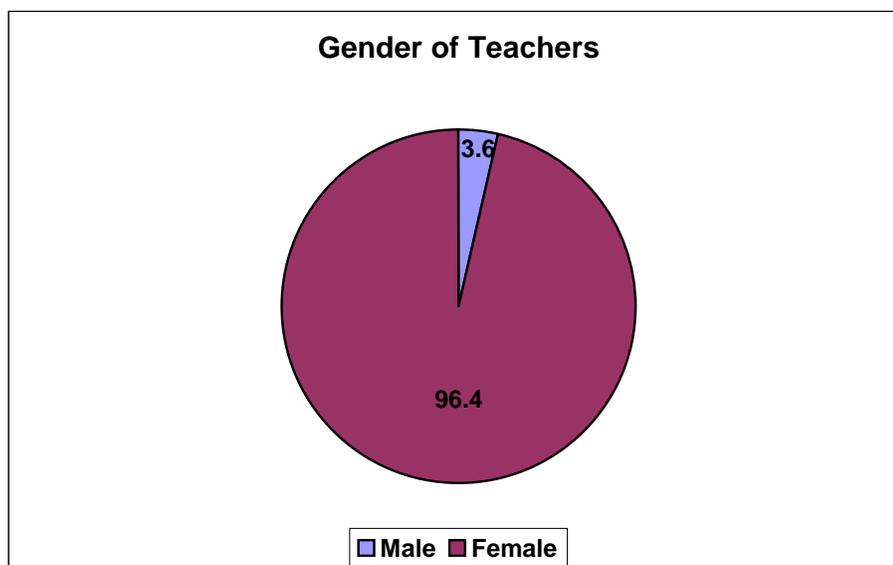


Figure 4.1: Distribution of the gender of teachers

#### 4.2.2 Age of teachers

Table 4.2: Age of teachers

Number of respondents	% Mean age of respondents	Minimum age of respondents	Maximum age of respondents	Missing data
139	40	20	58	6

The sample of the study consisted of 145 respondents. Out of the 145 respondents, 139 responded to the variable of age as indicated in Table 4.2. The table shows that 6 respondents did not answer the question. The mean age of the respondents was 40 years. The youngest respondent was 20 years of age and the oldest was 58 years old. The youngest respondent might have been an unqualified educator.

#### 4.2.3 Educational Management Development Centres (EMDCs)

Educational Management Development Centres (EMDCs) were launched in 2001 to support public schools with regard to educational management and development in the Western Cape. The metropolises known as Metropole Central, Metropole East, Metropole North and Metropole South are all based in the metropolitan area of Cape Town and classified as urban areas. The Breede River/Overberg, South Cape/Karoo and West Coast/Winelands EMDCs are classified as rural areas ([www.wced.gov.za](http://www.wced.gov.za)).

**Table 4.3: Number of teachers in each EMDC in the WCED**

<b>Educational Management Development Centre</b>	<b>Number of Consumer Studies teachers in the Western Cape Education Department</b>
<b>URBAN AREAS</b>	
<b>Central</b>	<b>30</b>
<b>East</b>	<b>37</b>
<b>North</b>	<b>45</b>
<b>South</b>	<b>40</b>
<b>RURAL AREAS</b>	
<b>Breede River/Overberg</b>	<b>32</b>
<b>South Cape/Karoo</b>	<b>34</b>
<b>West Coast/Winelands</b>	<b>30</b>
<b>Total</b>	<b>248</b>

The total number of the teachers were not always present at the cluster meetings when the questionnaire was filled in. Of the 248 Consumer Studies teachers employed with the WCED, 145 teachers completed the questionnaire. Reasons for the absenteeism of Consumer Studies teachers from the cluster meetings when the questionnaires were completed were due to prior appointments or family emergencies.

Figure 4.2 graphically displays the percentage of teachers who completed the questionnaire in each EMDC. The South Cape/Karoo EMDC showed the highest percentage of teachers (24.3%) completing the questionnaire, as they had the highest representation of teachers at the cluster meetings when the questionnaires were distributed. The Metropole South EMDC showed the lowest percentage of teachers (6.3%) completing the questionnaire, meaning that very few of the teachers were present at the cluster meetings when the questionnaire had to be completed.

It can be concluded that the South Cape/Karoo EMDC showed the highest percentage of teachers completing the questionnaires, which meant that the majority of teachers attended the cluster meetings where the questionnaires were to be filled in. The EMDC with the lowest percentage of completed questionnaires was Metropole South,

indicating that this EMDC had the lowest attendance of cluster meetings when the questionnaire was distributed.

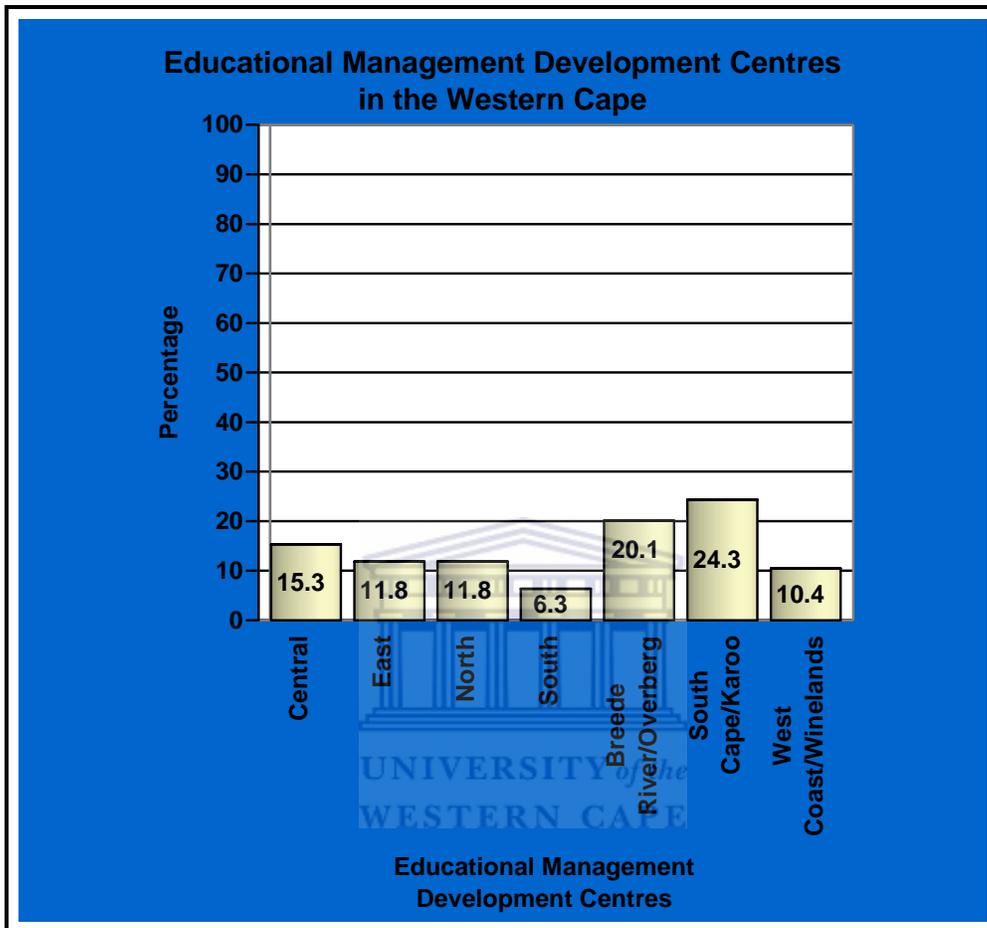


Fig 4.2: Distribution of the Educational Management Development Centres in the Western Cape Education Department

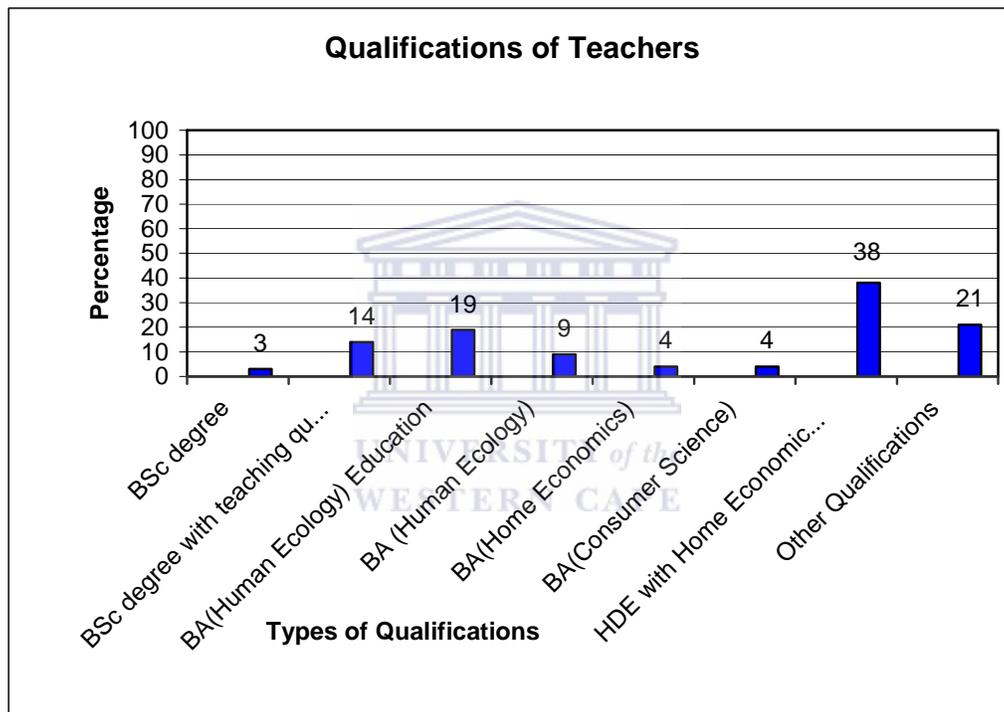
#### 4.2.4 Qualifications of participating teachers

**Table 4.4: Qualifications of teachers**

	N	%
1. BSc degree	4	3
2. BSc degree with teaching qualification	19	14
3. BA (Human Ecology) Education	26	19
4. BA (Human Ecology)	12	9
5. BA (Consumer Studies)	6	4
6. BA (Consumer Science)	6	4
7. HDE with Home Economics /Needlework	53	38
<b>8. Other qualifications</b>	30	21
Master's degree in Education	1	0.7
Master's degree in Home Economics	1	0.7
BA (Home Economics) Honours	3	2.01
B Education	1	0.7
BA (Home Economics) Education	4	2.8
BA (Consumer Studies)	1	0.7
Primary Teachers' Diploma	3	
Diploma in Education III	1	0.7
Tertiary Higher Education Diploma	1	0.7
Lower Secondary Teachers' Diploma (Human Ecology) III	1	0.7
(Secondary Teachers' Diploma) Home Economics	1	0.7
Teaching Diploma III Primary School	1	0.7
B Commerce (Marketing)	1	0.7
Post Graduate Diploma in Marketing Management	1	0.7
Teachers who did not indicate the type of "other" qualification obtained	9	6

The sample of teachers tallied 145 teachers, but only 140 respondents completed the question relating to the qualification. Five of the respondents refrained from

answering the question. Table 4.4 indicates the types of qualifications obtained by the Consumer Studies teachers in the WCED. The majority of the teachers, namely 53 out of 140, had a Higher Diploma in Education (HDE) in Home Economics and Needlework. 30 out of the 140 respondents indicated that they had other qualifications besides the ones listed in the questionnaire. It can therefore be assumed that there were teachers who had undertaken further studies. Figure 4.3 graphically displays the distribution of the various qualifications obtained by Consumer Studies teachers in the Western Cape Education Department.



**Figure 4.3: Qualifications of teachers**

As illustrated in Figure 4.3, 38% of the teachers (the majority) held a HDE in Home Economics/Needlework. 19% of the teachers had a qualification in BA (Human Ecology) Education. 14% of the teachers had a BSc degree with a teaching qualification and 3% of the teachers had a BSc degree, which was the lowest percentage obtained for the variable qualifications. 9% of the teachers had a BA degree in Human Ecology. 4% of the teachers had obtained a BA (Consumer Studies), while 4% of the teachers had a BA (Home Economics). 21% of the teachers had obtained “other” qualifications. Table 4.4 indicated the “other” type of qualifications obtained by Consumer Studies teachers.

To conclude the demographics of the study, it should be noted that the majority of Consumer Studies teachers were female and 40 years of age, holding a Higher Diploma in Education in Home Economics/Needlework.

The results for the various factors influencing the selection of an assessment method are as follows.

### **4.3 FACTORS INFLUENCING THE SELECTION OF AN ASSESSMENT METHOD**

The researcher wanted to determine the factors that best described the choice of assessment methods in the teaching portfolio. The researcher selected ten factors that influenced the choice of an assessment method in general, and the seven assessment methods used in the teaching portfolio. Once the results were analysed, the researcher displayed the data for each assessment method in tables. The row of each table represents the response to the assessment method and the numerical value which is “of no use” (1), “of limited use” (2), “of much use” (3) and “of considerable use” (4). The columns represent the factors that played a role in selecting an assessment method. There were ten factors, which included plan for instruction, diagnose student weaknesses, monitor student progress, communicate student achievement, motivate students, evaluate instruction, evaluate instructional materials, group students, encourage self-assessment and assign grades. In each table the mean values were highlighted to illustrate the factors that had been chosen for a particular assessment method. Table 4.6, 4.8, 4.10, 4.12, 4.14, 4.16 and 4.18 displayed this result.

These results were discussed to determine the factors that influenced the selection of an assessment method for the Consumer Studies teaching portfolio as an assessment tool (sub-objective 1).

#### **4.3.1 Summary of rank order for the factors influencing the selection of assessment methods**

Table 4.5 represents the rank order for the factors influencing the selection of assessment methods. A ranking function was performed on the mean values to determine which factors had the highest and the lowest mean respectively. The

researcher also wanted to determine which factors were of similar importance. The factors were ranked in descending order, with 1 = highest mean and 10 = lowest mean. The numbers 1-10 were placed in each of the cells in Table 4.5 for each assessment method in the teaching portfolio.

**Table 4.5: Rank order for factors influencing the selection of assessment methods**

	<b>RANK ORDER FOR ASSESSMENT METHODS</b>						
<b>Factor name</b>	<b>Observation-based</b>	<b>Test-based</b>	<b>Task-based</b>	<b>Self-assessment</b>	<b>Peer assessment</b>	<b>Group assessment</b>	<b>Learner portfolio</b>
<b>Plan for instruction</b>	3	4	1	5	5	4	4
<b>Diagnose student weaknesses</b>	1	1	4	9	8	8	3
<b>Monitor student progress</b>	2	2	2	8	10	7	1
<b>Communicate student achievement</b>	5	5	5	6	7	6	2
<b>Motivate students</b>	4	3	3	2	1	3	5
<b>Evaluate instruction</b>	7	6	6	3	4	2	7
<b>Evaluate instructional materials</b>	10	8	8	4	3	5	9
<b>Group students</b>	6	10	10	10	2	1	10
<b>Encourage self-assessment</b>	8	9	9	1	9	10	8
<b>Assign grades</b>	9	7	7	7	6	9	6

In Table 4.5 each of the assessment methods had a different highest mean. Only in observation-based and test-based assessment methods factor 2 (diagnose student weaknesses) represented the highest mean for both of these assessment methods. The mean that was ranked lowest four times, was factor 8 (group students). It is the lowest mean for test-based, task-based, self-assessment and learner portfolio assessment methods. According to Le Grange & Reddy (2000: 10), CASS provides teachers with feedback to determine if the learning outcomes have been achieved, and in turn, they

serve to identify learner strengths and weaknesses. Observation-based and test-based assessment methods are two methods used for CASS Consumer Studies teachers to obtain evidence for assessment of learners (Department of Education, 2003a: 40-41). Therefore the participants of this study felt that observation-based and test-based assessment methods serve to diagnose learner weaknesses.

### **4.3.2 Observation-based assessment**

Table 4.6 refers to the response of the teachers as to how they rated each factor for observation-based assessment. According to this table very few teachers felt that the factors were “of no use” or “of considerable use” for observation-based assessment. The response rate indicated that 44 out of 90 teachers (48.9%) considered “a plan for instruction” to be “of much use” for observation-based assessment. Similarly, other factors with a high proportion of responses indicating the construct to be “of much use”, were “to diagnose student weaknesses”, with 39 out of 91 teachers (42.9%) agreeing. Others were “monitor student weaknesses”, to which 40 out of 92 teachers (43.5%) agreed. The factor “motivate students” was supported by 40 out of 91 teachers (44%) and “encourage self-assessment”, by 34 out of 83 (41%).

**Table 4.6: Frequency table for observation-based assessment**

Factors influencing selection of assessment method	Of no use		Of limited use		Of much use		Of considerable use		Total	Total	Missing out of 145
	N	%	N	%	N	%	N	%	N	%	N
1. Plan for instruction	4	4.4	28	31.11	44	<b>48.89</b>	14	15.56	90	100	55
2. Diagnose student weaknesses	4	4.40	24	26.37	39	<b>42.86</b>	24	26.37	91	100	54
3. Monitor student progress	6	6.52	24	26.09	40	<b>43.48</b>	22	23.91	92	100	53
4. Communicate student achievement	10	11.24	31	34.83	34	38.20	14	15.73	89	100	56
5. Motivate students	12	13.19	19	20.88	40	<b>43.96</b>	20	21.98	91	100	54
6. Evaluate instruction	14	16.47	31	36.47	25	29.41	15	17.65	85	100	60
7. Evaluate instructional materials	24	27.59	22	25.29	30	34.48	11	12.64	87	100	58
8. Group students	17	19.54	25	28.74	31	35.63	14	16.09	87	100	58
9. Encourage self-assessment	17	20.48	23	27.71	34	<b>40.96</b>	9	10.84	83	100	62
10. Assign grades	22	27.85	17	21.52	26	32.91	14	17.72	79	100	66

Factor 2, which is “diagnose student weaknesses”, has the highest mean (2.912) as reflected in Figure 4.4, and tends toward response 3 that represents “of much use”. Thus the teachers felt that Factor 2, “diagnose student weaknesses”, is “of much use” for observation-based assessment. Van der Horst & McDonald (2003: 192) indicated that through observation an alert teacher is able to identify a learner’s change in behaviour or a lack of understanding content dealt with in the classroom. Therefore teachers have felt that observation-based assessment is “of much use” for identifying learners’ weaknesses. Figure 4.4 shows that the lowest mean (2.322) applies to Factor 7, referring to “evaluating instructional materials”. This indicates that Factor 7 tends toward response 2, which represents the variable “of limited use”. Clearly teachers did not find this factor of much use for selecting observation-based assessment, as it is primarily used for assessment of learners in the classroom and not for evaluating instructional material (Department of Education, 2003a: 40).

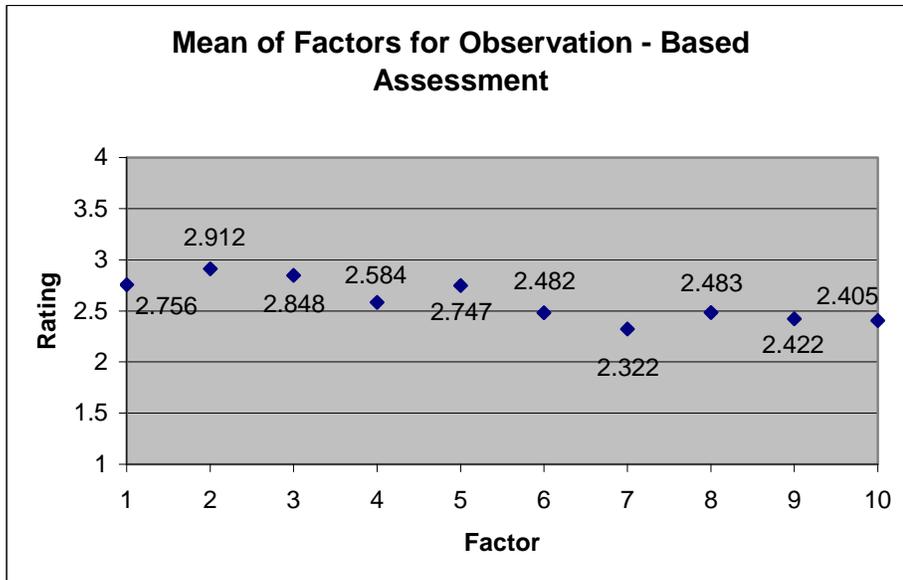


Figure 4.4: Mean of factors for observation-based assessment

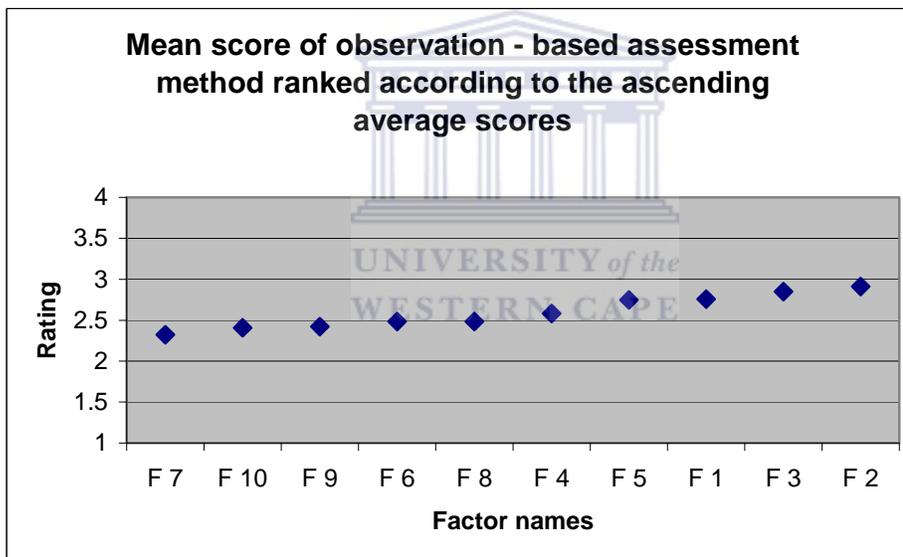


Figure 4.5: Mean score of observation-based assessment according to the ascending average scores

Figure 4.4 and Figure 4.5 are linked. Figure 4.4 represents the mean values for the factors influencing the selection of observation-based assessment. The researcher then ranked the mean values in Figure 4.4 in ascending order in Figure 4.5. Figure 4.5 shows that Factor 2 (diagnose student weaknesses), which has the highest mean, is ranked tenth, while Factor 7 (evaluate instructional materials), showing the lowest mean, is ranked first. This analysis was carried out so that the researcher could determine which mean values were of similar importance, and which mean values were significantly different for the observation-based assessment method. This

procedure was conducted for all the assessment methods used in the teaching portfolio, that is, test-based and task-based assessment, self-assessment, peer assessment, group assessment and the learner portfolio.

**Table 4.7: Pairwise comparison for observation-based assessment**

	Factor name	Factor no.	Factor No.	Factor name	Estimate of mean difference	Probability
6	<b>Plan for instruction</b>	1	7	Evaluate instructional materials	0.459	<.0001
7		1	8	Group students	0.2914	0.0096
8		1	9	Encourage self-assessment	0.3267	0.0041
9		1	10	Assign grades	0.3527	0.0023
11	<b>Diagnose student weaknesses</b>	2	4	Communicate student achievement	0.3297	0.0031
13		2	6	Evaluate instruction	0.4106	0.0003
14		2	7	Evaluate instructional materials	0.5871	<.0001
15		2	8	Group students	0.4195	0.0002
16		2	9	Encourage self-assessment	0.4548	<.0001
17		2	10	Assign grades	0.4808	<.0001
20	<b>Monitor student progress</b>	3	6	Evaluate instruction	0.351	0.0018
21		3	7	Evaluate instructional materials	0.5275	<.0001
22		3	8	Group students	0.3599	0.0013
23		3	9	Encourage self-assessment	0.3952	0.0005
24		3	10	Assign grades	0.4212	0.0002
32	<b>Motivate students</b>	5	7	Evaluate instructional materials	0.4288	0.0001
34		5	9	Encourage self-assessment	0.2965	0.0089
35		5	10	Assign grades	0.3225	0.0051

In Table 4.7, Friedman's test was used to analyse the data that determined the pairwise comparisons for the highest and lowest mean value regarding factors influencing the selection of the observation-based assessment method. This test would determine the p-value for each pair. The p-value would indicate if there was a significant difference between the highest mean and the remaining factors, or the lowest mean and the remaining factors. Friedman's test was conducted on all the assessment methods used in the study, namely test-based and task-based assessment, self-assessment, peer assessment, group assessment and learner portfolio assessment.

Table 4.7, 4.9, 4.11, 4.13, 15, 17 and 4.19 were reproductions of the pairwise comparison analysis conducted by the statistician. The factors which had the highest mean appeared in the “factor name” column on the right-hand side, and was compared to the “factor name” column on the left-hand side to indicate to which factors the highest mean were significantly different. The p-value column was used to indicate

significant difference from the highest or lowest mean. The pairwise comparison tables were used for all the assessment methods in the teaching portfolio.

Table 4.7, the pairwise comparison table for observation-based assessment, is linked to Figure 4.5, which is the mean score of observation-based assessment ranked according to ascending average scores. All p-values in Table 4.7 show that there is a significant difference between the two listed factors. As illustrated in Figure 4.4, Factor 2 (diagnose student weaknesses), the highest mean is significantly different from Factor 4 (communicate student achievement) ( $p=0.0031$ ), Factor 6 (evaluate instruction) ( $p=0.0003$ ), Factor 7 (evaluate instructional material) ( $p<0.0001$ ), Factor 8 (group students) ( $p=0.0002$ ), Factor 9 (encourage self-assessment) ( $p<0.0001$ ) and Factor 10 (assign grades) ( $p<0.0001$ ), as illustrated in Table 4.7. Factors 7, 9 and 10 were significantly high, as these factors had a  $p<0.0001$  and their estimate mean values were larger than 0.45. Figure 4.5 illustrates that Factor 2 was not viewed as of similar importance to Factors 4, 6, 7, 8, 9 and 10, but was of similar importance to Factors 1 (plan for instruction), 3 (monitor student progress) and 5 (motivate students). Factors 1, 3 and 5 that were viewed as of similar importance to Factor 2, lay between the response of 2.5 and 3, which is “of much use” in Figure 4.5. These factors also have the highest response rate to observation-based assessment in Table 4.6. Thus it can be confirmed that the respondents preferred Factors 1, 2, 3 and 5 for observation-based assessment.

Figure 4.4 indicated that Factor 7 had the lowest mean for observation-based assessment, which showed a highly significant difference from Factor 1 (plan for instruction), Factor 2 (diagnose student weaknesses), Factor 3 (monitor student progress) and Factor 5 (motivate students) ( $p<0.0001$ ) in Table 4.7. This p-value indicates that respondents did not view Factors 1, 2, 3 and 5 as being of similar importance to Factor 7, as shown in Figure 4.5. The factors that were significantly different from Factor 7, namely Factors 1 (plan for instruction), Factor 2 (diagnose student weaknesses), Factor 3 (monitor student progress) and Factor 5 (motivate students), are those factors that elicited the highest response rate in Table 4.6. This confirms that the factors representing plan for instruction, diagnose student weaknesses, monitor student progress and motivate students are of much use for observation-based assessment. Nieuwoudt & Beckley in Jacobs *et al.* (2004: 315)

state that one of the roles of the educator is to make decisions, specifically about lesson planning, on a daily basis. The decision about lesson planning or planning instruction includes making decisions about types of teaching methods, media learning activities and assessment activities. When using observation-based assessment in the classroom, an alert educator can identify the factors or evidence that change a learner's behaviour, or evaluate a learner's understanding of content dealt with in the classroom. This helps the educator to diagnose student weaknesses and monitor students' progress (Van der Horst & McDonald, 2003: 192). Therefore respondents indicated that planning for instruction, diagnosing student weaknesses, monitoring student progress and motivating students are "of considerable use" in observation-based assessment.

### **4.3.3 Test-based assessment**

Table 4.8 displays the response rate of the teachers towards the factors for test-based assessment. Table 4.8 indicates that a small number of teachers, namely 2 out of 92 (2.2%), rated the factors as being "of no use" for test-based assessment. There was a high response rate for certain factors regarded as "of considerable use" for test-based assessment. As stated in Table 4.8, these factors were "plan for instruction" with 47 out of 90 responses (52.2%), "diagnose student weaknesses" with 57 out of 101 responses (56.4%), "monitor student progress" with 57 out of 96 responses (57.3%), "communicate student achievement" with 53 out of 94 (56.4%) and "assign grades" with 47 of 86 responses (54.7%).

**Table 4.8: Frequency table for test-based assessment**

Factors influencing selection of assessment method	Of no use		Of limited use		Of much use		Of considerable use		Total	Total	Missing out of 145
	N	%	N	%	N	%	N	%	N	%	N
1. Plan for instruction	3	3.33	8	8.89	32	35.56	47	52.22	90	100	55
2. Diagnose student weaknesses	2	1.98	7	6.93	35	34.65	57	56.44	101	100	44
3. Monitor student progress	3	3.13	6	6.25	32	33.33	55	57.29	96	100	49
4. Communicate student achievement	4	4.26	9	9.57	28	29.79	53	56.38	94	100	51
5. Motivate students	2	2.17	13	14.13	41	44.57	36	39.13	92	100	53
6. Evaluate instruction	7	7.87	14	15.73	36	40.45	32	35.96	89	100.01	56
7. Evaluate instructional materials	10	11.36	19	21.59	39	44.32	20	22.73	88	100	57
8. Group students	22	25.88	21	24.71	17	20.00	25	29.41	85	100	60
9. Encourage self-assessment	11	12.64	22	25.29	28	32.18	26	29.89	87	100	58
10. Assign grades	3	3.49	10	11.63	26	30.23	47	54.65	86	100	59

Factor 2 (diagnose student weaknesses) had the highest mean (3.455), as shown in Figure 4.6, and is close to 3 which represented "of much use". From this mean it is evident that the teachers regarded factor 2 as being "of much use" for test-based assessment. This implies that to diagnose student weaknesses, test-based assessment is utilised. Lubisi *et al.* (1997: 37) indicated that tests would be a rewarding experience, because it would identify strengths and weaknesses when feedback was given by the teacher. In turn, test-based assessment would be a valuable tool for teachers, because it would make teachers aware of learners' weaknesses. In Figure 4.6 the lowest mean (2.529), factor 8 (group students) which was close to 3, was rated by the teachers as being "of much use" for test-based assessment, in other words test-based assessment is used for grouping students. This shows that both the highest and lowest mean tended to lean toward the more positive responses of the rating scale.

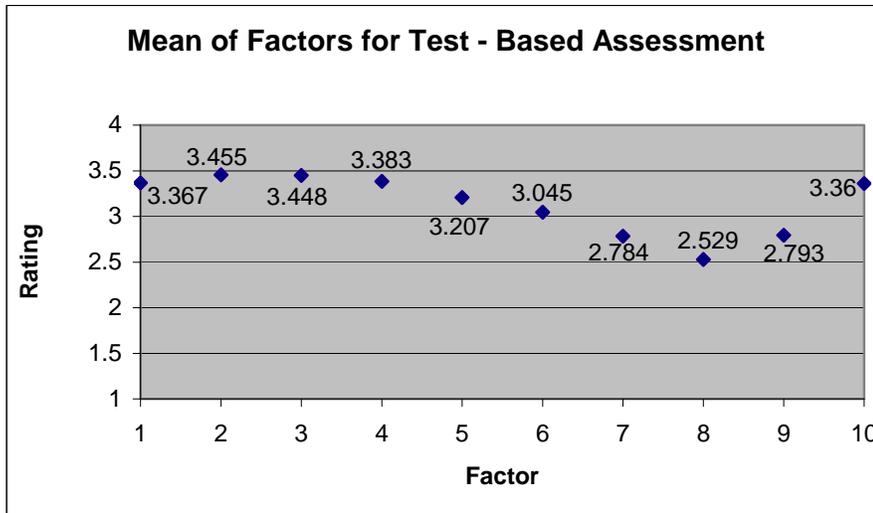


Figure 4.6: Mean of factors for test-based assessment

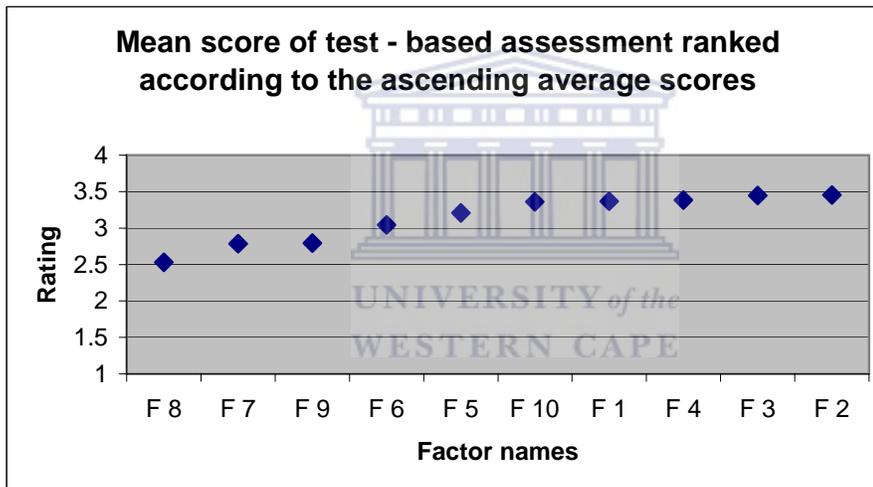


Figure 4.7: Mean score of test-based assessment according to the ascending average scores

Figure 4.6 and Figure 4.7 are linked. Figure 4.6 displays the mean values for factors influencing the selection of the test-based assessment method. The researcher then ranked the mean values in Figure 4.6 of the factors influencing the selection of the test-based assessment method in Figure 4.7. In Figure 4.7, Factor 2 (diagnose student weaknesses) was ranked tenth, because it had the highest mean as illustrated in Figure 4.6. Factor 8 (group students) was ranked first, since it had the lowest mean as shown in Figure 4.6.

**Table 4.9: Pairwise comparison for test-based assessment**

	Factor name	Factor no.	Factor no.	Factor name	Estimate of mean difference	Probability
5	<b>Plan for instruction</b>	1	6	Evaluate instruction	0.3247	0.0032
6		1	7	Evaluate instructional materials	0.5829	<.0001
7		1	8	Group students	0.8366	<.0001
8		1	9	Encourage self-assessment	0.5612	<.0001
13	<b>Diagnose student weaknesses</b>	2	6	Evaluate instruction	0.3976	0.0002
14		2	7	Evaluate instructional materials	0.6557	<.0001
15		2	8	Group students	0.9094	<.0001
16		2	9	Encourage self-assessment	0.6341	<.0001
20	<b>Monitor student progress</b>	3	6	Evaluate instruction	0.3864	0.0004
21		3	7	Evaluate instructional materials	0.6446	<.0001
22		3	8	Group students	0.8983	<.0001
23		3	9	Encourage self-assessment	0.6229	<.0001
26	<b>Communicate student achievement</b>	4	6	Evaluate instruction	0.3213	0.0032
27		4	7	Evaluate instructional materials	0.5794	<.0001
28		4	8	Group students	0.8331	<.0001
29		4	9	Encourage self-assessment	0.5578	<.0001
32	<b>Motivate students</b>	5	7	Evaluate instructional materials	0.4207	0.0001
33		5	8	Group students	0.6744	<.0001
34		5	9	Encourage self-assessment	0.3991	0.0003
37	<b>Evaluate instruction</b>	6	8	Group students	0.5118	<.0001
39	<b>Assign Grades</b>	10	6	Evaluate instruction	-0.3142	0.005
42		10	7	Evaluate instructional materials	-0.5723	<.0001
44		10	8	Group students	-0.826	<.0001
45		10	9	Encourage self-assessment	-0.5507	<.0001

Table 4.9, the pairwise comparison table for test-based assessment, is linked to Figure 4.7, which is the mean score of test-based assessment ranked according to ascending average scores. All p-values in Table 4.9 show that there is a significant difference between the two related factors for test-based assessment. As illustrated in Figure 4.6, the highest mean was obtained for Factor 2 (diagnose student weaknesses). Table 4.9 showed that Factor 7 (evaluate instructional materials), Factor 8 (group students) and Factor 9 (encourage self-assessment) were significantly different from Factor 2 ( $p < 0.0001$ ), while Factor 6 (evaluate instruction) was significantly different from Factor 2 ( $p = 0.0002$ ). Figure 4.7 illustrates that Factor 2 was not viewed as of similar importance to Factors 6, 7, 8 and 9, but of similar importance to Factor 1 (plan for instruction), Factor 3 (monitor student progress), Factor 4 (communicate student achievement), Factor 5 (motivate students) and Factor 10 (assign grades). These Factors, 1, 3, 4 and 10, that were viewed as of similar importance to Factor 2, are the

same factors that elicited the highest response rates in Table 4.8, and scored between the response of 3 and 3.5, which is “of much use” in Figure 4.7. Thus it is confirmed that the teachers preferred Factors 1, 2, 3, 4 and 10 for test-based assessment.

Table 4.9 indicated that Factor 8 (group students), which showed the lowest mean in Figure 4.6, were significantly different from Factor 1 (plan for instruction), Factor 2 (diagnose student weaknesses), Factor 3 (monitor student progress), Factor 4 (communicate student achievement), Factor 5 (motivate students), Factor 6 (evaluate instruction) and Factor 10 (assign grades). These factors had a high significant difference, because  $p < 0.0001$ . This p-value indicates that the teachers did not view Factors 1, 2, 3, 4, 5 and 6 of similar importance to Factor 8, as shown in Figure 4.7. The factors that were significantly different from Factor 8 are those that elicited the highest response rate in Table 4.8, being Factors 1 (plan for instruction), 2 (diagnose student weaknesses), 3 (monitor student progress), 4 (communicate student achievement) and 10 (assign grades). This confirms that plan for instruction, diagnose student weaknesses, monitor student progress, communicate student achievement and assign grades are “of much use” for test-based assessment.

Lubisi *et al.* (1997: 36) indicated that the main function of tests was to measure learner achievement, which in turn contributed to learner progress and attainment. Tests were utilised as a method of reliability and validity for learner results, and therefore it was of importance that teachers would assign accurate and meaningful grades to learners. These grades provide a comprehensive assessment of a learner’s achievement, which gave an indication of a learner’s performance at school. Teachers used tests to monitor learners’ performance or progress, because it provided an extensive and objective form of judgement.

Learners can experience tests as a rewarding experience when receiving feedback from the teacher, because it provides them with information about the answers given in the test and the results of the test. The learner is also able to identify strengths and weaknesses in the test or content of the work. When planning for instruction, teachers can use tests to plan goals for a particular learning area, in this case for Consumer Studies, to ensure that the specific outcomes of the learning area is met. Tests would also allow teachers to plan tasks that learners can manage, so that goals set by the

teacher are met. (Lubisi *et al.* 1997: 36-37). Lubisi *et al.* (1997) support the factors selected by the teachers for test-based assessment as an assessment method.

#### **4.3.4 Task-based assessment**

Table 4.10 represents the response rate of the teachers for task-based assessment. In Table 4.10, task-based assessment had the lowest response rate, namely 2 out of 83 (2.41%) for the option “of no use” for plan for instruction. There was a high response rate for plan for instruction, namely 37 out of 83 (44.6%), while diagnose student weaknesses had 42 out of 90 responses(46.7%), monitor student progress 36 out of 89 responses (40.5%), communicate student achievement 36 out of 85 (42.4%), motivate students 39 out of 87 (44.8%), evaluate instruction 34 out of 82 (41.5%) and evaluate instructional materials 35 out of 81 responses (43.2%) for the option “of much use” in Table 4.10.



**Table 4.10: Frequency table for task-based assessment**

Factors influencing selection of assessment method	Of considerable use		Of much use		Of limited use		Of no use		Total	Total	Missing out of 145
	N	%	N	%	N	%	N	%	N	%	N
<b>1. Plan for instruction</b>	28	33.73	<b>37</b>	<b>44.58</b>	16	19.28	2	2.41	83	100	62
<b>2. Diagnose student weaknesses</b>	27	30.00	<b>42</b>	<b>46.67</b>	17	18.89	4	4.44	90	100	55
<b>3. Monitor student progress</b>	32	35.96	<b>36</b>	<b>40.45</b>	18	20.22	3	3.37	89	100	56
<b>4. Communicate student achievement</b>	25	29.41	<b>36</b>	<b>42.35</b>	21	24.71	3	3.53	85	100	60
<b>5. Motivate students</b>	29	33.33	<b>39</b>	<b>44.83</b>	15	17.24	4	4.60	87	100	58
<b>6. Evaluate instruction</b>	23	28.05	<b>34</b>	<b>41.46</b>	14	17.07	11	13.41	82	100	63
<b>7. Evaluate instructional materials</b>	17	20.99	<b>35</b>	<b>43.21</b>	15	18.52	14	17.28	81	100	64
<b>8. Group students</b>	14	17.07	26	31.71	30	36.59	12	14.63	82	100	63
<b>9. Encourage self-assessment</b>	17	20.24	31	36.90	24	28.57	12	14.29	84	100	61
<b>10. Assign grades</b>	19	26.03	27	36.99	14	19.18	13	17.81	73	100	72

Factor 1 (plan for instruction) showed the highest mean (3.096), as displayed in Figure 4.8, and tends toward the response rate of 4, which is “of considerable use”. From this response, it was clear that the teachers saw plan for instruction as “of considerable use” for task-based assessment, which means that teachers planned for instruction by using task-based assessment. The lowest mean, Factor 8 (group students), had a mean of 2.512 and tended toward the response rate of 3, which is “of much use” in Figure 4.8. This indicated that the teachers had seen group students as being “of much use” for task-based assessment. The response for the highest and lowest mean leaned toward the positive responses on the scale.

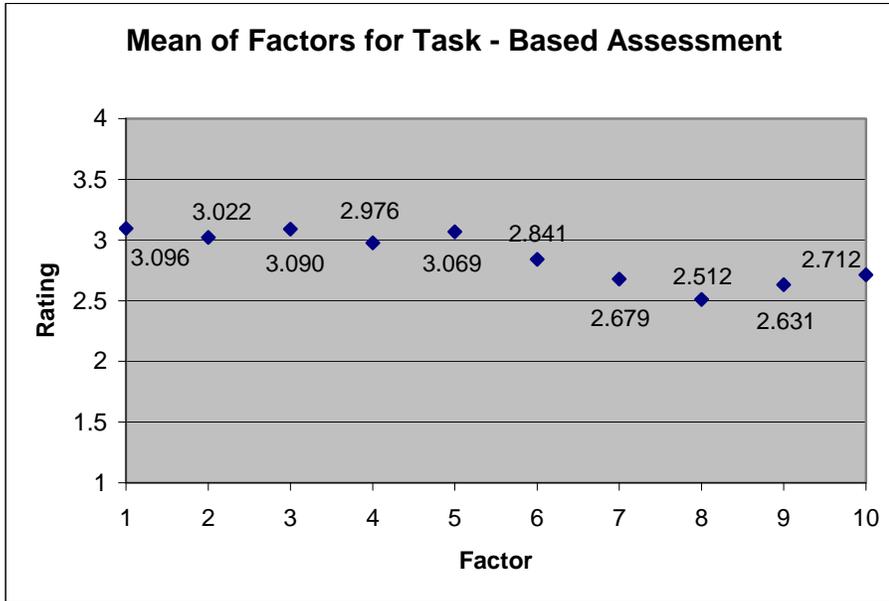


Figure 4.8: Mean of factors for task-based assessment

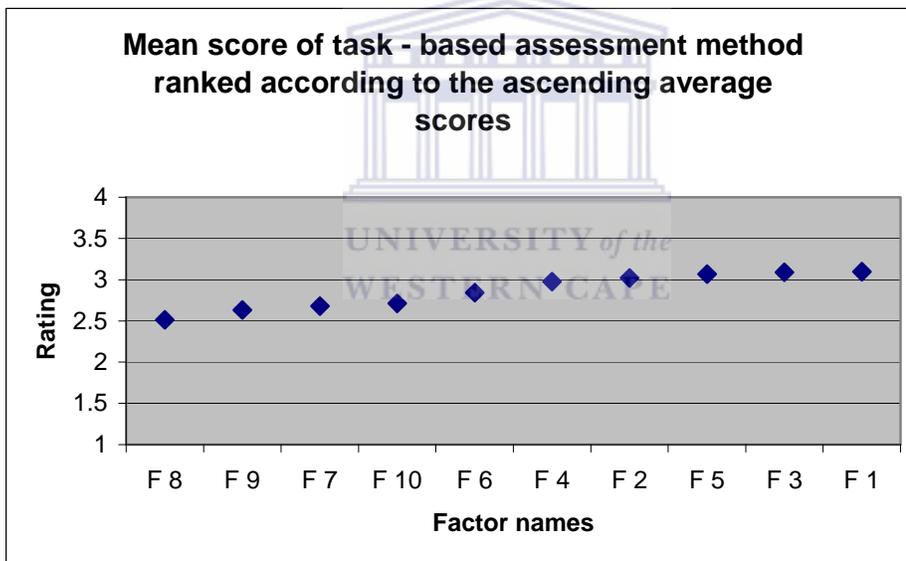


Figure 4.9: Mean score of task-based assessment according to the ascending average scores

Figure 4.8 and Figure 4.9 are linked. Figure 4.8 displays the mean values for the factors influencing the selection of the task-based assessment method. The researcher then ranked the mean values in Figure 4.8 in ascending order in Figure 4.9. In Figure 4.9, Factor 1 (plan for instruction) was ranked tenth, because it had the highest mean in Figure 4.8, while Factor 8 (group students) was ranked first in Figure 4.9, because it had the lowest mean in Figure 4.8.

**Table 4.11: Pairwise comparison for task-based assessment**

	Factor Name	Factor no.	Factor no.	Factor name	Estimate of mean difference	Probability
5	<b>Plan for instruction</b>	1	6	Evaluate instruction	0.2765	0.0078
6		1	7	Evaluate instructional materials	0.4309	<.0001
7		1	8	Group students	0.6192	<.0001
8		1	9	Encourage self-assessment	0.4887	<.0001
9		1	10	Assign grades	0.38	0.0004
14	<b>Diagnose student weaknesses</b>	2	7	Evaluate instructional materials	0.3083	0.0026
15		2	8	Group students	0.4965	<.0001
16		2	9	Encourage self-assessment	0.366	0.0003
21	<b>Monitor student progress</b>	3	7	Evaluate instructional materials	0.3787	0.0002
22		3	8	Group students	0.567	<.0001
23		3	9	Encourage self-assessment	0.4365	<.0001
24		3	10	Assign grades	0.3278	0.0019
27	<b>Communicate student achievement</b>	4	7	Evaluate instructional materials	0.2769	0.0073
28		4	8	Group students	0.4652	<.0001
29		4	9	Encourage self-assessment	0.3347	0.0011
32	<b>Motivate Students</b>	5	7	Evaluate instructional materials	0.3609	0.0005
33		5	8	Group students	0.5492	<.0001
34		5	9	Encourage self-assessment	0.4187	<.0001
35		5	10	Assign grades	0.31	0.0035
37	<b>Evaluate instruction</b>	6	8	Group students	0.3426	<0.0010

Table 4.11, the pairwise comparison table for task-based assessment, is linked to Figure 4.9, that gives the mean scores of task-based assessment ranked according to ascending average scores. All the p-values in Table 4.11 show that there is a significant difference between the two related factors for task-based assessment. As illustrated in Figure 4.8, the highest mean for task-based assessment was obtained by Factor 1 (plan for instruction) and was significantly different from Factor 7 (evaluate instructional material), Factor 8 (group students), Factor 9 (encourage self-assessment) ( $p < 0.0001$ ), Factor 6 (evaluate instruction) ( $p = 0.0078$ ) and Factor 10 (assign grades) ( $p = 0.0004$ ), as illustrated in Table 4.11. Figure 4.9 illustrates that Factor 1 was not viewed as of similar importance to Factors 6, 7, 8, 9 and 10, but of similar importance to Factor 2 (diagnose student weaknesses). Factor 3 (monitor student progress), Factor 4 (communicate student achievement) and Factor 5 (motivate students) are closely related to Factor 1, as shown in Figure 4.9. Factors 2, 3, 4 and 5 that were viewed as of similar importance to Factor 1, lay between the response of 3 and 3.5, representing “of much use” in Figure 4.9. These factors also have the highest response rate to task-based assessment in Table 4.10. Thus it is

confirmed that the respondents preferred Factors 1, 2, 3, 4 and 5 for task-based assessment.

Figure 4.8 indicated that Factor 8 (group students) had the lowest mean for task-based assessment and differed significantly from Factor 1 (plan for instruction), Factor 2 (diagnose student weaknesses), Factor 3 (monitor student progress), Factor 4 (communicate student achievement), Factor 5 (motivate students) ( $p < 0.0001$ ) and Factor 6 (evaluate instruction) ( $p < 0.0010$ ) in Table 4.11. The p-value indicates that the teachers did not see Factors 1, 2, 3, 4 and 5 as of similar importance to Factor 8, as shown in Figure 4.9. Factor 6 (evaluate instruction) is significantly different from the highest mean (Factor 1) and lowest mean (Factor 8); this means that the teachers did not consider Factor 6 as closely related to Factor 1 and 8 for task-based assessment in Table 4.11. The factors that were significantly different from Factor 8, namely Factor 1 (plan for instruction), Factor 2 (diagnose student weaknesses), Factor 3 (monitor student progress), Factor 4 (communicate student achievement) and Factor 5 (motivate students), also had the highest response rate for task-based assessment in Table 4.10. This confirms that plan for instruction, diagnose student weaknesses, monitor student progress, communicate student achievement and motivate students are “of much use” for task-based assessment.

#### **4.3.5 Self-assessment**

Table 4.12 represents the response rate of teachers toward each factor influencing the selection of self-assessment as a method. Table 4.12 indicates that there were a considerable number of teachers, namely 25 out of 92 (27.2%), who responded to the most negative response “of no use”. This was considerably higher than observation-based (Table 4.6), test-based (Table 4.8) and task-based assessment (Table 4.10). Table 4.12 indicates that 17 out of 92 (18.5%) responded to the most positive response “of considerable use”. Table 4.12 illustrates that there was no particular response that the teachers preferred for self-assessment, unlike for observation-based, test-based and task-based assessment. This kind of response indicates that the teachers did not view any of the factors as “of considerable use” or “of no use” for self-assessment.

**Table 4.12: Frequency table for self-assessment**

Factors influencing selection of assessment method	Of considerable use		Of much use		Of limited use		Of no use		Total	Total	Missing
	N	%	N	%	N	%	N	%	N	%	N
1. Plan for instruction	15	17.44	20	23.26	21	24.42	30	34.88	86	100	59
2. Diagnose student weaknesses	9	10.23	21	23.86	30	34.09	28	31.82	88	100	57
3. Monitor student progress	12	14.12	17	20.00	26	30.59	30	35.29	85	100	60
4. Communicate student achievement	15	17.05	17	19.32	24	27.27	32	36.36	88	100	57
5. Motivate students	17	18.68	26	28.57	22	24.18	26	28.57	91	100	54
6. Evaluate instruction	13	15.12	24	27.91	24	27.91	25	29.07	86	100	59
7. Evaluate instructional materials	14	16.67	19	22.62	27	32.14	24	28.57	84	100	61
8. Group students	11	13.41	15	18.29	28	34.15	28	34.15	82	100	63
9. Encourage self-assessment	17	18.48	28	30.43	22	23.91	25	27.17	92	100	53
10. Assign grades	9	11.69	23	29.87	16	20.78	29	37.66	77	100	68

Figure 4.10 graphically displays the mean values for the factors influencing the selection of the self-assessment method. Factor 9 (encourage self-assessment) had the highest mean of 2.402, as illustrated in Figure 4.10 and tended toward the response “of limited use” From this response it is evident that the teachers regarded Factor 9 as “of limited use” for self-assessment. The purpose of self-assessment is to develop learners’ skills of self-evaluation, critical thinking about their own work and taking responsibility for their own learning. Mastering these skills is aimed at being able to select commendable pieces of work for the learner portfolio. If self-assessment is executed correctly, learners are able to monitor their own progress and teachers would be able to determine the types of work valued by the learners (Marnewick & Rouhani in Jacobs *et al.*, 2004: 274). The purpose of self-assessment is related to the factor “encourage self-assessment” which presented as the highest mean for this assessment method. On the contrary, Figure 4.10 displays that Factor 8 (group students) had the lowest mean of 2.110 and lent itself to the response “of limited use”. In Figure 4.10 it

is evident that the highest and lowest mean fell in the response rate “of limited use”, and this response was on the negative side of the ordinal scale.

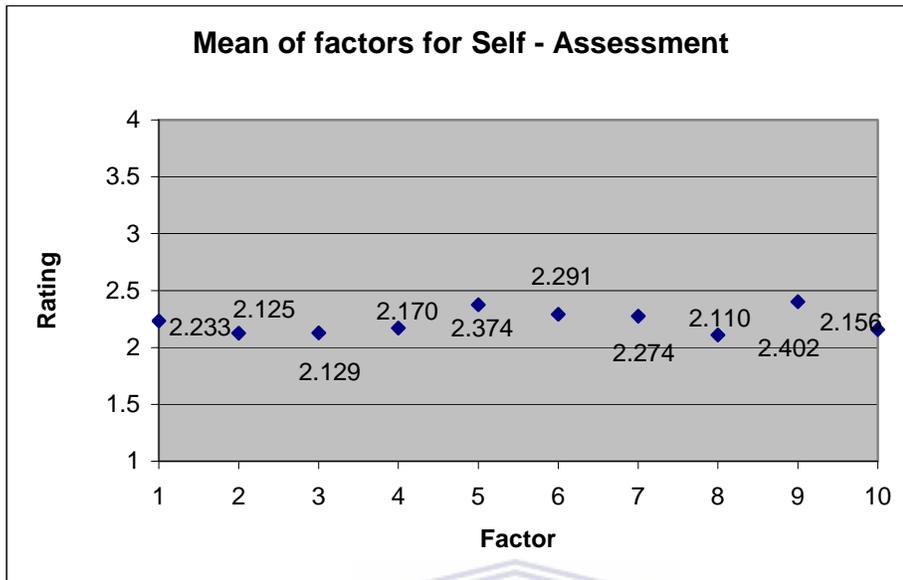


Figure 4.10: Mean of factors for self-assessment

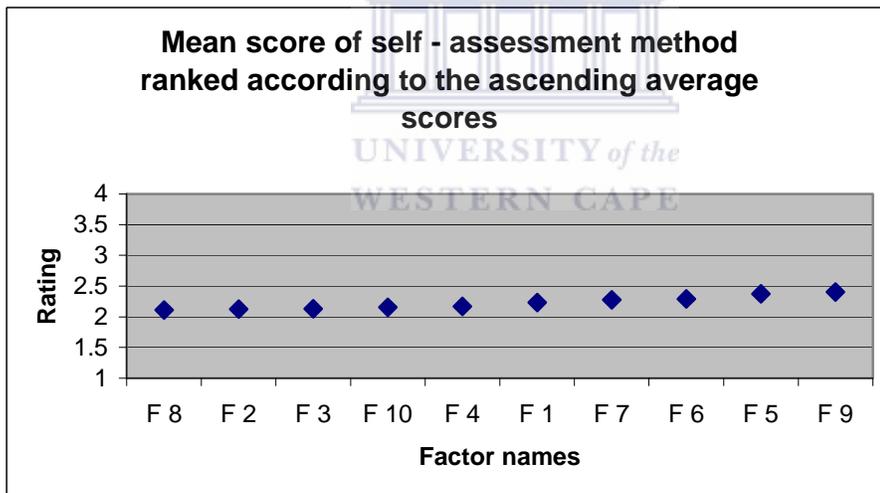


Figure 4.11: Mean score of self-assessment according to the ascending average scores

Figure 4.10 and Figure 4.11 are linked. Figure 4.11 graphically displays the rank order of the mean values for self-assessment that are displayed in Figure 4.10. In Figure 4.11 the mean scores are ranked in ascending order. In Figure 4.11, it is clear that Factor 9 (encourage self-assessment) was ranked tenth, because it had the highest mean in Figure 4.10. Factor 8 (group students) was ranked first in Figure 4.11, because it had the lowest mean in Figure 4.10.

**Table 4.13: Pairwise comparison for self-assessment**

	<b>Factor Name</b>	<b>Factor no.</b>	<b>Factor No.</b>	<b>Factor name</b>	<b>Estimate of mean difference</b>	<b>Probability</b>
12	Diagnose student weaknesses	2	5	Motivate students	-0.2387	0.0086

Table 4.13, the pairwise comparison table for self-assessment is linked to Figure 4.11 that is the mean score of self-assessment ranked according to ascending average scores. There are no p-values that indicate a significant difference for the highest and lowest mean in Table 4.13. Figure 4.10 illustrated that the highest mean was obtained by Factor 9 (encourage self-assessment) and the lowest mean was obtained by Factor 8 (group students). It is evident from Table 4.13 that none of the factors were significantly different from Factor 8 or Factor 9. Figure 4.11 displayed that all the factors were closely related and of similar importance to one another. This is evident in Figure 4.11, a graphic illustration of the fact that all the factors scoring between 2 and 2.5 were “of limited use”. This confirms that the respondents indicated that all the factors in Table 4.12 were “of limited use” for the self-assessment method.

#### **4.3.6 Peer assessment**

Table 4.14 represents the response rate of teachers toward the factors influencing the selection of the peer assessment method. Table 4.14 illustrates that there was no particular response by the teachers for “of considerable use” and “of no use”. The response to peer assessment in Table 4.14 showed similar results towards self-assessment in Table 4.12, in that the teachers did not prefer any particular factor. This is unlike the responses obtained for observation-based assessment (Table 4.6), test-based assessment (Table 4.8) and task-based assessment (Table 4.10). In other words, the teachers did not see any of the factors as being “of considerable use” or “of no use” for peer assessment.

**Table 4.14: Frequency table for peer assessment**

Factors influencing selection of assessment method	Of considerable use		Of much use		Of limited use		Of no use		Total	Total	Missing
	N	%	N	%	N	%	N	%	N	%	N
1. Plan for instruction	12	13.79	20	22.99	29	33.33	26	29.89	87	100	58
2. Diagnose student weaknesses	8	9.09	24	27.27	25	28.41	31	35.23	88	100	57
3. Monitor student progress	7	7.95	22	25.00	26	29.55	33	37.50	88	100	57
4. Communicate student achievement	10	11.76	20	23.53	26	30.59	29	34.12	85	100	60
5. Motivate students	19	21.59	21	23.86	18	20.45	30	34.09	88	100	57
6. Evaluate instruction	11	13.25	25	30.12	18	21.69	29	34.94	83	100	62
7. Evaluate instructional materials	11	13.10	25	29.76	20	23.81	28	33.33	84	100	61
8. Group students	16	19.28	17	20.48	21	25.30	29	34.94	83	100	62
9. Encourage self-assessment	8	9.52	23	27.38	22	26.19	31	36.90	84	100	61
10. Assign grades	9	11.54	24	30.77	15	19.23	30	38.46	78	100	67

Figure 4.12 graphically displays the mean values for the factors that influenced the selection of the peer assessment method. Factor 5 (motivate students) had the highest mean of 2.330, as shown in Figure 4.12 and tended toward the response 2, representing “of limited use”. This indicated that the teachers regarded “motivate students” to be “of limited use” for peer assessment. Factor 3 (monitor student progress) had the lowest mean of 2.034 in Figure 4.12; it tended towards 2 and was rated by the teachers as being “of limited use” for peer assessment. Thus both the highest and lowest mean tended to lean toward the negative responses of the ordinal scale.

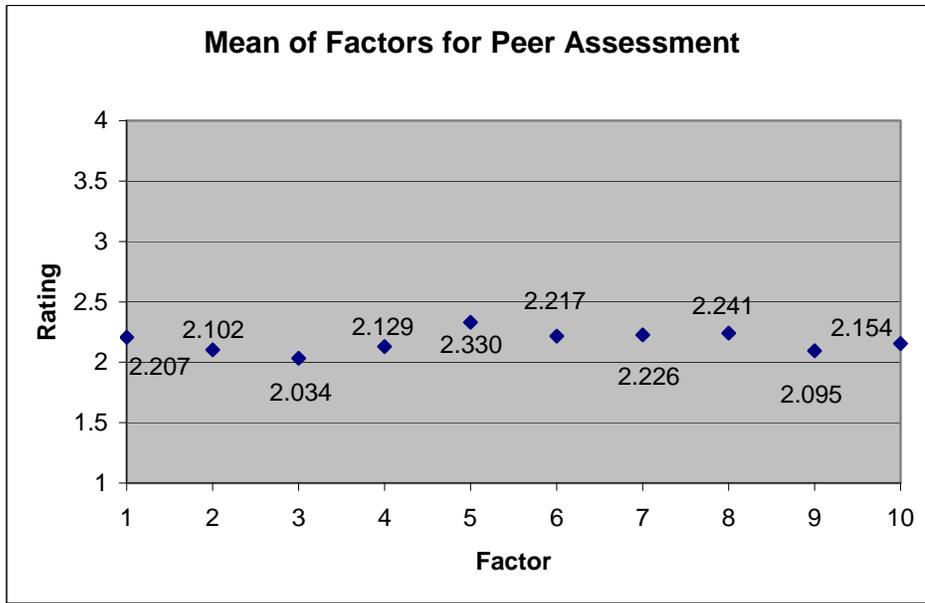


Figure 4.12: Mean of factors for peer assessment

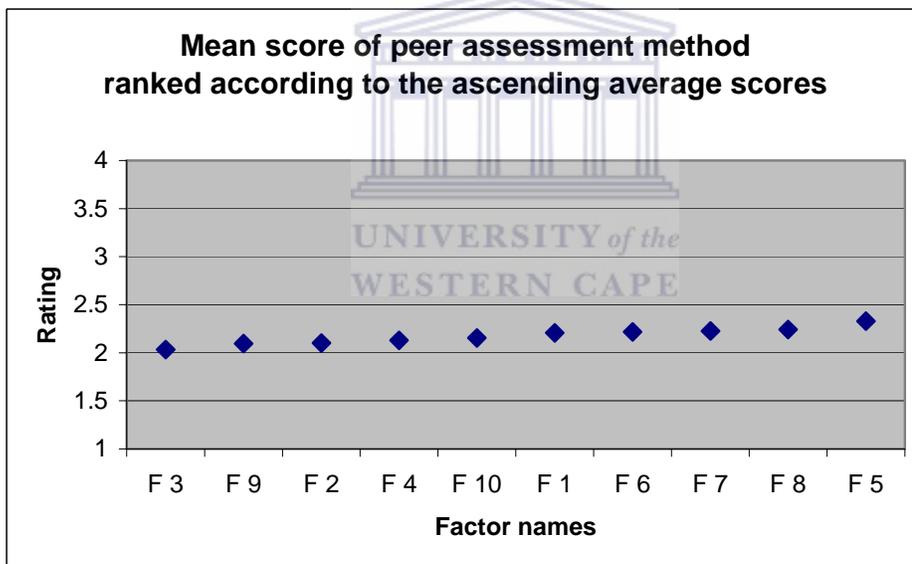


Figure 4.13: Mean score of peer assessment according to the ascending average scores

Figure 4.12 and Figure 4.13 are linked. Figure 4.13 graphically displays the rank order of the mean scores in ascending order for peer assessment. In Figure 4.13 it is evident that Factor 5 (motivate students) was ranked tenth, because it had the highest mean in Figure 4.12, while Factor 3 (monitor student progress) was ranked first, because it had the lowest mean in Figure 4.12.

**Table 4.15: Pairwise comparison for peer assessment**

	Factor name	Factor no.	Factor no.	Factor name	Estimate of mean difference	Probability
19	<b>Monitor student progress</b>	3	5	Motivate students	-0.2513	0.0024
22		3	8	Group students	-0.2200	0.0086

Table 4.15, which is the pairwise comparison table for peer assessment, is linked to Figure 4.13, which is the mean scores for peer assessment ranked according to ascending average scores. All the p-values in Table 4.15 show that there is a significant difference between the two related factors for peer assessment. As indicated in Figure 4.12, the highest mean for peer assessment was obtained by Factor 5 (motivate students) and it was significantly different from Factor 3 (monitor student progress), which was the lowest mean in Figure 4.12, as highlighted in Table 4.15. Factor 3 was significantly different from Factor 5 ( $p=0.0024$ ). The estimate of mean difference between Factor 3 and Factor 5 is -0.2513. This difference is small and it is graphically displayed in Figure 4.13, because the mean for Factor 3 and Factor 5 scored between 2 and 2.5 on the ordinal scale. If Factor 5 is significantly different from Factor 3, it would follow that Factor 5 is of similar importance to Factor 1 (plan for instruction), Factor 2 (diagnose student weaknesses), Factor 4 (communicate student achievement), Factor 6 (evaluate instruction), Factor 7 (evaluate instructional material), Factor 9 (encourage self-assessment) and Factor 10 (assign grades). This is evident from Figure 4.13 that all the factors scored between 2 and 2.5 on the ordinal scale. This means that the teachers see all the factors “of limited use” for peer assessment.

Figure 4.12 indicated that Factor 3 (monitor student progress) showed the lowest mean for peer assessment and was significantly different from Factor 5 (motivate students) ( $p=0.0024$ ) and Factor 8 (group students) ( $p=0.0086$ ) in Table 4.15. The p-value indicates that the respondents did not view Factors 5 and 8 as of similar importance to Factor 3, as shown in Figure 4.13. The estimate of mean difference of Factor 5 and Factor 8 between Factor 3 is -0.2513 and -0.22 respectively. This difference is small and it is illustrated in Figure 4.13 where the mean scored between 2 and 2.5, which is “of limited use” for peer assessment.

If Factor 3 is significantly different from Factors 5 and 8, then Factors 1, 2, 4, 6, 7, 9 and 10 are of similar importance for peer assessment. It is evident in Figure 4.11 that all the factors lay between 2 and 2.5 on the ordinal scale. This means that the teachers saw these factors as being “of limited use” for peer assessment. This confirms that none of the factors presented as a preference in Table 4.15, and therefore they are all “of limited use” for peer assessment.

The factors that were used to select peer assessment, do not warrant that it will in fact be selected as an assessment method. According to the Department of Education (2003a: 40) peer assessment empowers learners to evaluate their own and a peer’s work if the assessment criteria is given beforehand. Peer assessment encourages learners to assist one another in peer activities. Learners who receive positive, constructive criticism from their peers are able to think critically about their own work and that of their peers (Marnewick & Rouhani in Jacobs *et al.*, 2004: 275). Neither of the factors in the questionnaire was linked to peer assessment.

#### **4.3.7 Group assessment**

Table 4.16 represents the teachers’ responses to the factors of group assessment. There were a reasonable number of teachers (26 out of 91) (28.6%) who agreed with the most negative response “of no use” for group assessment. Table 4.16 indicates that 21 out of 91 (23.1%) chose the most positive response “of considerable use”. The response rates for “of considerable use” and “of no use” were considerably higher than for observation-based (Table 4.6), test-based (Table 4.8) and task-based assessment (Table 4.10). Table 4.16 illustrates that there was no particular response favouring group-assessment, unlike the preference expressed for observation-based, test-based and task-based assessment. This kind of response indicates that the teachers did not view any of the factors as “of considerable use” or “of no use” for group assessment.

**Table 4.16: Frequency table for group assessment**

Factors influencing selection of assessment method	Of considerable use		Of much use		Of limited use		Of no use		Total	Total	Missing
	N	%	N	%	N	%	N	%	N	%	N
<b>1. Plan for instruction</b>	13	15.48	24	28.57	20	23.81	27	32.14	84	100	61
<b>2. Diagnose student weaknesses</b>	8	9.09	23	26.14	30	34.09	27	30.68	88	100	57
<b>3. Monitor student progress</b>	*7	8.14	26	30.23	22	25.58	30	34.88	85	100	60 (59)
<b>4. Communicate student achievement</b>	11	13.25	19	22.89	28	33.73	25	30.12	83	100	62
<b>5. Motivate students</b>	8	9.64	33	39.76	16	19.28	26	31.33	83	100	62
<b>6. Evaluate instruction</b>	11	13.58	26	32.10	20	24.69	24	29.63	81	100	64
<b>7. Evaluate instructional materials</b>	6	7.23	33	39.76	17	20.48	27	32.53	83	100	62
<b>8. Group students</b>	21	23.08	21	23.08	23	25.27	26	28.57	91	100	54
<b>9. Encourage self-assessment</b>	8	9.88	18	22.22	25	30.86	30	37.04	81	100	64
<b>10. Assign grades</b>	7	9.46	22	29.73	14	18.92	31	41.89	74	100	71

Figure 4.14 graphically displays the mean values for the factors that influence the selection of the group assessment method. Figure 4.14 indicated that Factor 8 (group students) had the highest mean of 2.407. This showed that the teachers regarded Factor 8 to be “of limited use” for group assessment. Factor 9 (encourage self-assessment) had the lowest mean of 2.049 and tended toward the response “of limited use” in Figure 4.15. The response of the highest and lowest mean tended toward the response “of limited use”, which was the negative response on the ordinal scale.

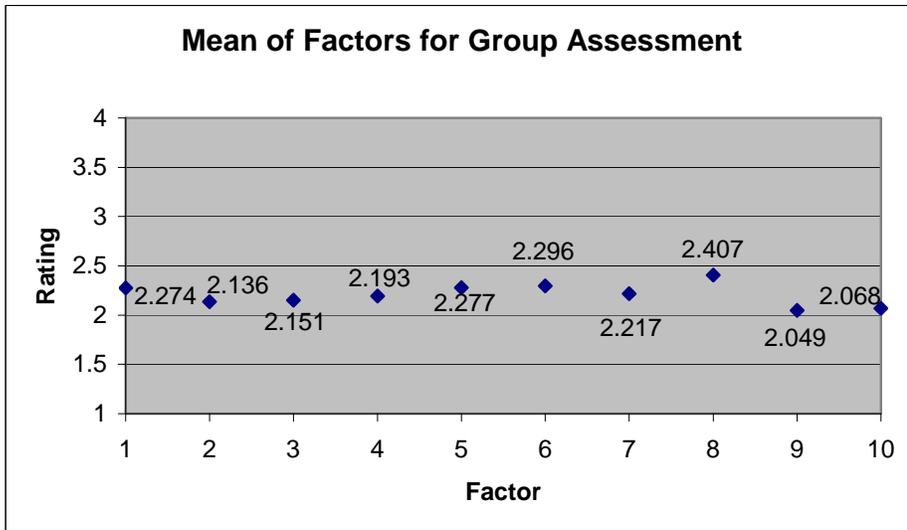


Figure 4.14: Mean of factors for group assessment

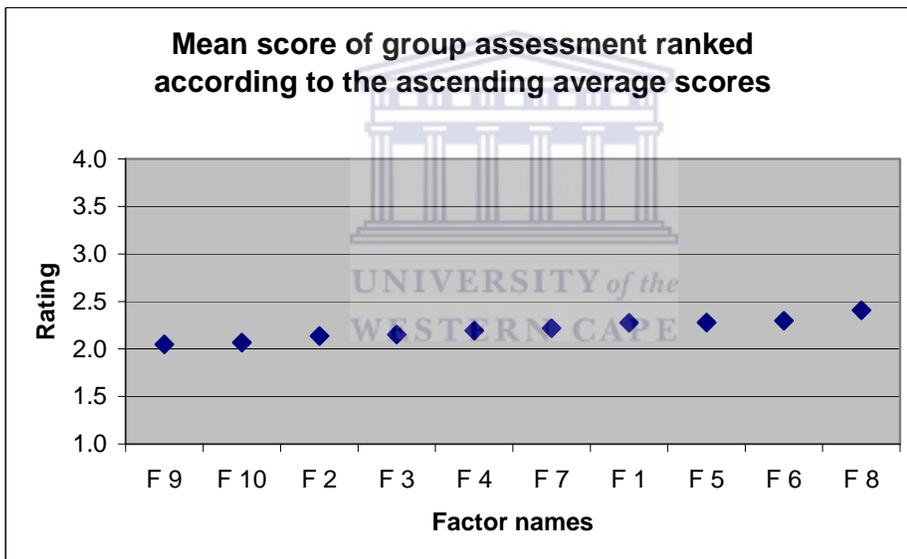


Figure 4.15: Mean score of group assessment according to the ascending average scores

Figure 4.14 and Figure 4.15 are linked. Figure 4.15 graphically illustrates the ranked means of the factors influencing the selection of the group assessment method. In Figure 4.14, Factor 8 (group students) had the highest mean and was ranked tenth in Figure 4.15. In Figure 4.14, it was Factor 9 (encourage self assessment) that had the lowest mean and was ranked first in Figure 4.15.

**Table 4.17: Pairwise comparison for group assessment**

	Factor name	Factor no.	Factor No.	Factor name	Estimate of mean difference	Probability
13	Diagnose student weaknesses	2	6	Evaluate instruction	-0.2317	0.008
15		2	8	Group students	-0.2332	0.0062
38	Encourage self-assessment	9	6	Evaluate instruction	0.2449	0.0057
43		9	8	Group students	0.2464	0.0047

Table 4.17 that is the pairwise comparison for group assessment is linked to Figure 4.15, the rank order of the mean scores for group assessment. All p-values in Table 4.17 show that there was a significant difference between the two listed factors. As illustrated in Figure 4.14, the highest mean obtained by Factor 8 (group students) was significantly different from Factor 2 (diagnose student weaknesses) ( $p=0.0062$ ) and Factor 9 (group students) ( $p=0.0047$ ), as highlighted in Table 4.17. The p-values in Table 4.17 indicated that the difference between Factor 8 and Factors 2 and 9 was small, but significant. This is also shown by the estimate of mean difference which is smaller than 0.2500. Thus the teachers viewed Factor 2 and Factor 9 as closely related to Factor 8. This is evident in Figure 4.15, because the range of the means fall between 2 and 2.5. In Table 4.17 neither of these factors took preference above one another. If Factor 8 is significantly different from Factor 2 and Factor 9; it can be stated that Factor 1 (plan for instruction), Factor 3 (monitor student progress), Factor 4 (communicate student achievement), Factor 5 (motivate students), Factor 6 (evaluate instruction), Factor 7 (evaluate instructional material), Factor 8 (group students) and Factor 10 (assign grades) are of similar importance for group assessment. Figure 4.15 graphically displays that all the factors scored between 2 and 2.5 on the ordinal scale. This indicates that the teachers saw all the factors “of limited use” for group assessment.

The factor with the highest mean for group assessment was group students. However, Criticos *et al.* (2004: 104) point out that the focus of group work is based on a task that is required to be completed by group members. The Department of Education (2003a: 40) indicates that group assessment evaluates the group work process, which refers to how group members cooperate and assist each other, an equal division of work and each member’s contribution to the group project and the group product. Group assessment evaluates the social skills, time management and resource

management. Therefore group work does not necessarily group students, and therefore it was “of limited use” in selecting group assessment as an assessment method.

#### **4.3.8 Learner portfolio**

The Consumer Studies learner portfolio contains evidence of all the assessment methods discussed earlier, that is observation-based assessment, test-based assessment, task-based assessment, self-assessment, peer assessment and group assessment. Even though the Consumer Studies learner portfolio includes all of these assessment methods, the final portfolio of the learner is also used as an assessment tool.

Table 4.18 represents the response rate of the teachers toward the learner portfolio as an assessment method. The response “of no use” had a low response of 9 out of 75 (12%) for Factor 10 (assign grades). This indicates that the majority of teachers did not view the assessment of the learner portfolio as “of no use” to the assessment process. Neither was there a strong agreement with the most positive response “of considerable use” to the learner portfolio in Table 4.18. The highest frequencies fell in the response rate “of considerable use”. These frequencies for learner portfolio assessment are indicated in Table 4.18, and include diagnose student weaknesses (43 out of 90, or 47.8%), monitor student progress (39 out of 90, or 43.3%), communicate student achievement (37 out of 87, or 42.5%), motivate students (44 out of 87, or 50.6%), encourage self-assessment (34 out of 84, or 40.5%) and assign grades (36 out of 75, or 48%). These highest frequencies indicate that teachers regarded these factors as being “of much use” for learner portfolio assessment.

**Table 4.18: Frequency table for learner portfolio assessment**

Factors influencing selection of assessment method	Of considerable use		Of much use		Of limited use		Of no use		Total	Total	Missing
	N	%	N	%	N	%	N	%	N	%	N
<b>1. Plan for instruction</b>	35	39.33	25	28.09	19	21.35	10	11.24	89	100	56
<b>2. Diagnose student weaknesses</b>	29	32.22	<b>43</b>	<b>47.78</b>	14	15.56	4	4.44	90	100	55
<b>3. Monitor student progress</b>	35	38.89	<b>39</b>	<b>43.33</b>	10	11.11	6	6.67	90	100	55
<b>4. Communicate student achievement</b>	32	36.78	<b>37</b>	<b>42.53</b>	13	14.94	5	5.75	87	100	58
<b>5. Motivate students</b>	22	25.29	<b>44</b>	<b>50.57</b>	16	18.39	5	5.75	87	100	58
<b>6. Evaluate instruction</b>	20	24.10	31	37.35	13	15.66	19	22.89	83	100	62
<b>7. Evaluate instructional materials</b>	16	19.28	30	36.14	18	21.69	19	22.89	83	100	62
<b>8. Group students</b>	12	14.63	30	36.59	17	20.73	23	28.05	82	100	63
<b>9. Encourage self-assessment</b>	14	16.67	<b>34</b>	<b>40.48</b>	24	28.57	12	14.29	84	100	61
<b>10. Assign grades</b>	21	28.00	<b>36</b>	<b>48.00</b>	9	12.00	9	12.00	75	100	70

Figure 4.16 graphically displays the mean values for the factors influencing the selection of the group assessment method. Figure 4.16 displays that Factor 3 (monitor student progress) had the highest mean of 3.144, representing the response “of much use”. It is evident that the teachers felt that Factor 3 (monitor student progress) was “of much use” for learner portfolio assessment. Factor 8 (group students) had the lowest mean of 2.378, which corresponded with the response “of limited use” in Figure 4.16. This indicates that the teachers regarded Factor 8 (group students) as being “of limited use” for learner portfolio assessment. The response for the highest mean leaned toward the positive end of the ordinal scale, while the lowest mean leaned toward the negative end of the ordinal scale.

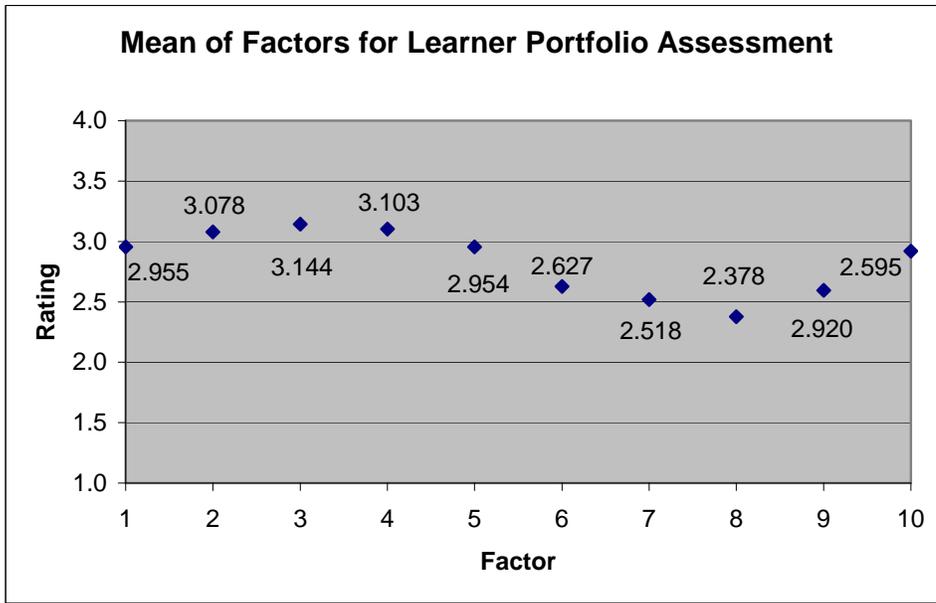


Figure 4.16: Mean of factors for learner portfolio assessment

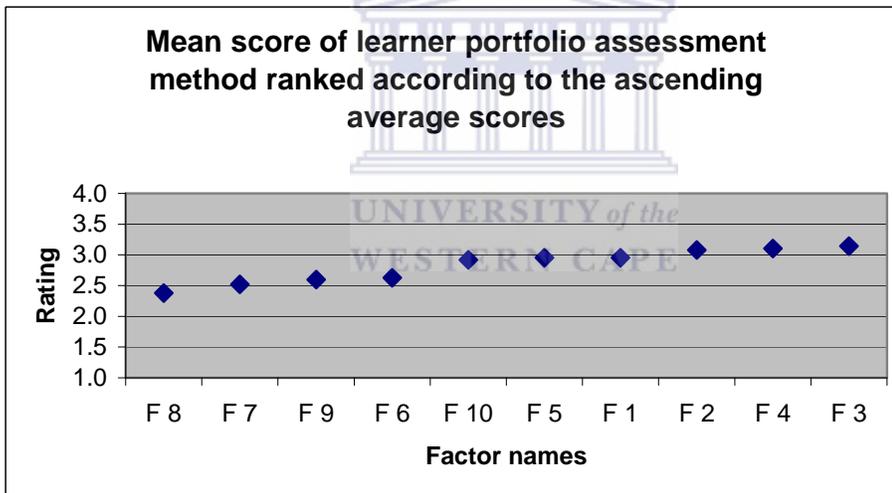


Figure 4.17: Mean score of learner portfolio assessment according to the ascending average scores

Figure 4.16 and Figure 4.17 are linked. Figure 4.17 displays the rank order for the mean scores of learner portfolio assessment. In Figure 4.16, Factor 3 (monitor student progress) showing the highest mean was ranked tenth in Figure 4.17, and Factor 8 (group students) was ranked first in Figure 4.17, because it had the lowest mean in Figure 4.16.

**Table 4.19: Pairwise comparison for learner portfolio assessment**

	Factor name	Factor no.	Factor no.	Factor name	Estimate of mean difference	Probability
5	<b>Plan for instruction</b>	1	6	Evaluate instruction	0.2932	0.0081
6		1	7	Evaluate instructional materials	0.3991	0.0003
7		1	8	Group students	0.5517	<.0001
8		1	9	Encourage self-assessment	0.3302	0.0028
13	<b>Diagnose student weaknesses</b>	2	6	Evaluate instruction	0.4228	0.0001
14		2	7	Evaluate instructional materials	0.5287	<.0001
15		2	8	Group students	0.6813	<.0001
16		2	9	Encourage self-assessment	0.4598	<.0001
20	<b>Monitor student progress</b>	3	6	Evaluate instruction	0.4963	<.0001
21		3	7	Evaluate instructional materials	0.6022	<.0001
22		3	8	Group students	0.7548	<.0001
23		3	9	Encourage self-assessment	0.5332	<.0001
26	<b>Communicate student achievement</b>	4	6	Evaluate instruction	0.4573	<.0001
27		4	7	Evaluate instructional materials	0.5632	<.0001
28		4	8	Group students	0.7158	<.0001
29		4	9	Encourage self-assessment	0.4942	<.0001
31	<b>Motivate students</b>	5	6	Evaluate instruction	0.3209	0.0038
32		5	7	Evaluate instructional materials	0.4268	0.0001
33		5	8	Group students	0.5794	<.0001
34		5	9	Encourage self-assessment	0.3579	0.0012
39	<b>Assign grades</b>	10	6	Evaluate instruction	-0.3048	0.0081
42		10	7	Evaluate instructional materials	-0.4107	0.0004
44		10	8	Group students	-0.5634	<.0001
45		10	9	Encourage self-assessment	-0.3418	0.003

Table 4.19, the pairwise comparison table for learner portfolio assessment is linked to Figure 4.17, which is the mean scores for learner portfolio assessment ranked according to ascending average scores. All p-values in Table 4.19 show that there is a significant difference between the two listed factors for learner portfolio assessment. As illustrated in Figure 4.16, Factor 3 (monitor student progress), the highest mean, was significantly different from Factor 6 (evaluate instruction), Factor 7 (evaluate instructional materials), Factor 8 (group students) and Factor 9 (encourage self-assessment) ( $p < 0.0001$ ), as highlighted in Table 4.19. Figure 4.17 illustrates that Factor 3 was not viewed as of similar importance to Factors 6, 7, 8 and 9, but of similar importance to Factor 1 (plan for instruction), Factor 2 (diagnose student weaknesses), Factor 4 (communicate student achievement), Factor 5 (motivate students) and Factor 10 (assign grades). Factors 1, 2, 4, 5 and 10 were viewed as of similar importance to Factor 3, because these factors scored between 2.5 and 3.5, which is “of much use” in Figure 4.17. This indicates that the teachers felt that

Factors 1, 2, 3, 4, 5, and 10 were “of much use” for learner portfolio assessment. In Table 4.18, Factors 2, 3, 4, 5 and 10 are among the highest frequencies obtained for learner portfolio assessment. Thus it is confirmed that the respondents regarded diagnose student weaknesses, monitor student progress, communicate student achievement, motivate students and assign grades to be “of much use” for learner portfolio assessment.

Figure 4.16 indicated that Factor 8 (group students) had the lowest mean for learner portfolio assessment, and differed significantly from Factor 1 (plan for instruction), Factor 2 (diagnose student weaknesses), Factor 3 (monitor student progress), Factor 4 (communicate student achievement), Factor 5 (motivate students) and Factor 10 (assign grades) ( $p < 0.0001$ ) in Table 4.19. The  $p$ -values indicate that the respondents did not see Factors 1, 2, 3, 4, 5 and 10 as of similar importance to Factor 8 as displayed in Figure 4.17. The factors that differed significantly from Factor 8, namely Factor 1, 2, 3, 4, 5 and 10, were the factors with the highest response rate in Table 4.18. Figure 4.17 graphically displays that Factors 1, 2, 3, 4, 5 and 10 scored between 2.5 and 3.5 on the ordinal scale and represents the response “of much use”. This confirms that the factors: plan for instruction, diagnose student weaknesses, monitor student progress, communicate student achievement, motivate students and assign grades were regarded as “of much use” for learner portfolio assessment in this study.

For Factor 1, plan for instruction, learner portfolios could accomplish the alignment of the curriculum, instruction and assessment that other assessment methods seldom achieve and can thus improve teaching practices (Van der Horst & McDonald, 2003: 195). Factor 2, diagnose student weaknesses, allows learners to determine weaknesses and improve on them. Weaknesses can also be diagnosed by teachers. Factor 3, monitor student progress, allows the teacher to monitor learners’ progress while developing the learner portfolio. However, the teachers must not interfere with the learner’s creativity. The monitoring of learners’ progress is carried out throughout the year (Marnewick & Rouhani in Jacobs *et al.*, 2004: 304). Algonquin College (1995: 4) in Van der Horst & McDonald (2003: 306) indicate that step four of the six steps used to assist teachers in evaluating a teaching portfolio, is for the teacher to give a provisional mark for the learning portfolio based on the learning process that has been accomplished in the teaching portfolio. Step 5 would require the teacher to engage

with the learner about the learner portfolio to clarify and gain information about the portfolio that the learner had produced. Through this engagement process with the learner, the teacher is able to communicate student achievement to the learner, which is Factor 4 that influenced the selection of the learner portfolio as an assessment method. After the teacher has liaised with the learner about the learner portfolio, the teacher assigns a comment and mark for the learner portfolio. This is linked to factor 10, assign grades that influenced the selection of the learner portfolio as an assessment method (Algonquin College, 1995: 4 in Van der Horst & McDonald, 2003: 306). It is evident that these factors influenced the selection of the learner portfolio as an assessment method.

In conclusion, the factors that influenced the selection of observation-based assessment, test-based assessment and task-based assessment were: plan for instruction, diagnose student weaknesses and monitor student progress. Another factor that influenced the selection of observation-based assessment and task-based assessment, was motivate students. Communicate student achievement influenced the selection of test-based and task-based assessment. Assign grades influenced test-based assessment as an assessment method. All the factors that influenced observation-based, test-based and task-based assessment as an assessment method were seen as being of much use for all the chosen factors. There was an interesting observation for task-based assessment. It reached an asymptote whereby the mean values increased and then levelled off in Figure 4.9.

The factors influencing the learner portfolio as an assessment tool encompassed all the factors selected for observation-based, test-based and task-based assessment, to include plan for instruction, diagnose student weaknesses, monitor student progress, communicate student achievement, motivate students and assign grades. All these factors also elicited the response “of much use” for learner portfolio assessment. All the factors would apply for the learner portfolio, because observation-based, test-based and task-based assessment are included in the learner portfolio as evidence of the various types of assessment that took place throughout the year. Marnewick & Rouhani in Jacobs *et al.* (2004: 304) state that the learner portfolio monitors a learner’s progress in a variety of assessments throughout the year. Boschee & Baron (1993) in Van der Horst and McDonald (2003: 197) indicate that examples of various

types of assessments that could be included in a portfolio are test results, projects, essays, journal pages and entries, records of learners' appraisal, sketches and drawings, evidence of knowledge acquisition and skills development in specific content areas, indicators of learner's growth, evidence of progress toward achievement of specific learning outcomes and observational records.

For the methods of self assessment, peer assessment and group assessment, there were no factors that the respondents specifically selected. The response to all the factors were "of limited use" for self-, peer and group assessment. It can be deduced that none of the factors was seen as of much use of in the selection of self-, peer and group assessment.

The results of this study indicated the factors that would influence the selection of a particular assessment method. These considerations must be evident in the Consumer Studies teaching portfolio.

#### **4.4 ATTITUDES TOWARDS THE ASSESSMENT PROCESS**

In this section of the questionnaire, the teachers had to rate their attitude toward the assessment process, which was the compilation of the teaching portfolio with all the assessment methods included in the learner portfolio. These are observation-based assessment, test-based assessment, task-based assessment, self-assessment, peer assessment and group assessment. Nine bipolar adjectives were used to describe the assessment process. These adjectives include valuable – worthless, successful – unsuccessful, efficient – inefficient, important – unimportant, good – bad, fair – unfair, reputable – disreputable, flexible – rigid and relaxed – tense. The teachers had to rate each of these adjectives, from 1 being extremely negative, to 6 being extremely positive. The researcher analysed the data and placed each bipolar adjective in a graph. Each adjective was discussed separately. The mode or highest frequency was used to determine the highest response rate. The data was discussed to determine the attitudes of teachers towards the assessment process when developing a Consumer Studies teaching portfolio as an assessment tool (sub-objective 2).

#### 4.4.1 Valuable ... worthless

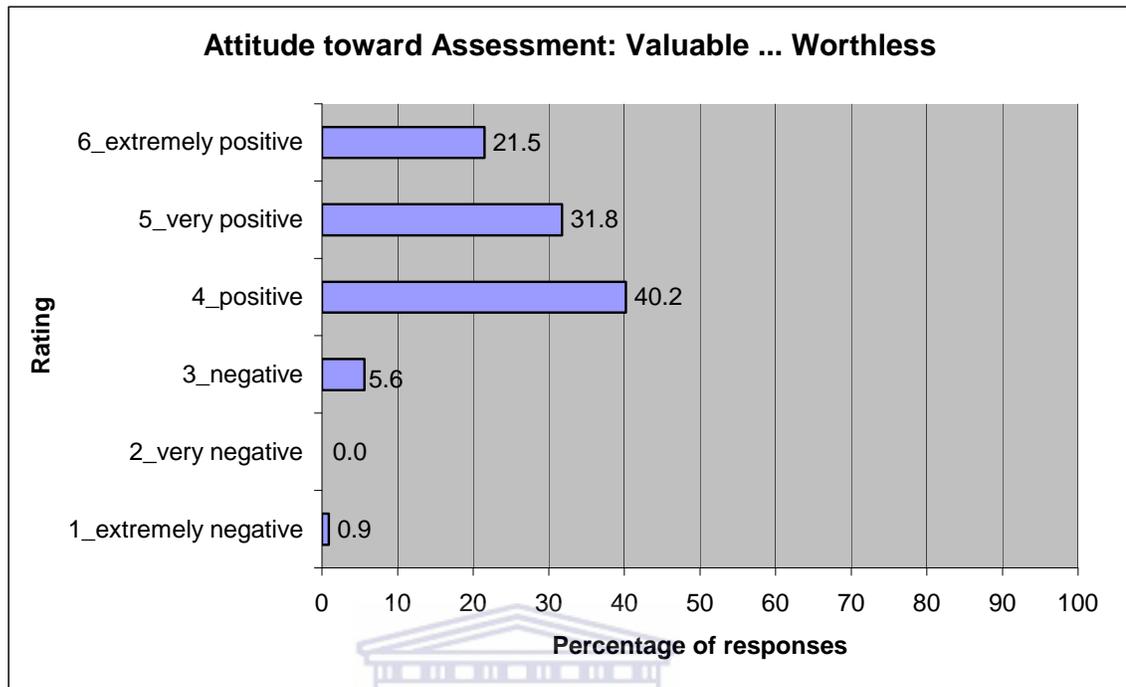


Figure 4.18: Valuable ... Worthless

In Figure 4.18, the mode for the Valuable ... Worthless attitude elicited a positive response of 93.5%. The teachers' positive response moved from "extremely positive" to "positive". The response towards the negative response ranging from "negative" to "extremely negative", was 6.5%. Wyatt & Looper (2004: 11) indicate that the portfolio approach assisted teachers to assess the value of assignments or assessment methods. The portfolio approach assisted teachers to question the value of the chosen assessment methods in the teaching portfolio.

#### 4.4.2 Successful ... Unsuccessful

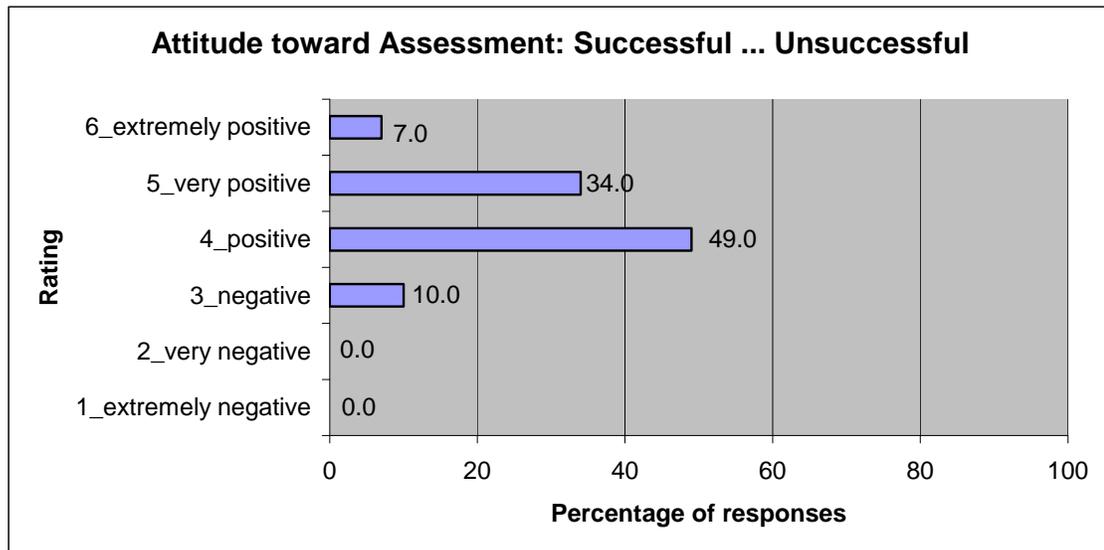


Figure 4.19: Successful ... Unsuccessful

For Successful ... Unsuccessful (Figure 4.19), 90% of the respondents indicated, on a scale ranging from “extremely positive” to “positive”, that the assessment process was successful. The response rate for the negative domain was 10% and it moved from “extremely negative” to “negative”. None of the teachers responded to the most negative end of the scale that was “very negative” and “extremely negative”. In a study by Apple & Shimo (2002: 55) they pointed out that portfolio assessment contributes to increased motivation, increased autonomy and active learning, factors which in turn serve to develop successful learners. This confirms that teaching portfolios as an assessment tool can be successful.

### 4.4.3 Efficient ... Inefficient

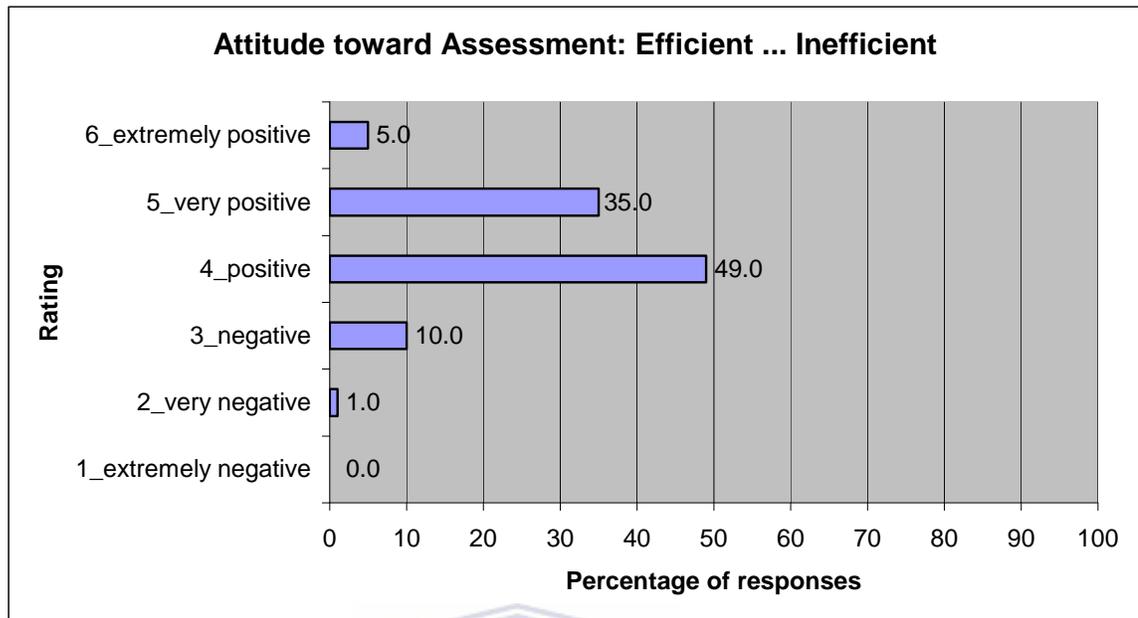


Figure 4.20: Efficient ... Inefficient

The highest percentage for Efficient ... Inefficient was positive, at 89% (Figure 4.20). The positive response for Efficient ... Inefficient ranged from “extremely positive” to “positive”. However, the response for the negative domain was low (11%) and ranged from “negative” to “extremely negative”. The response rates for the positive and negative domains were similar to the attitudes Successful ... Unsuccessful and Efficient ... Inefficient (Figure 4.19 and Figure 4.20). It can be stated that if the assessment process is successful, it is efficient, seeing that the teachers had the same response rate for “positive” (49%) (Figure 4.19 and 4.20).

#### 4.4.4 Important ... Unimportant

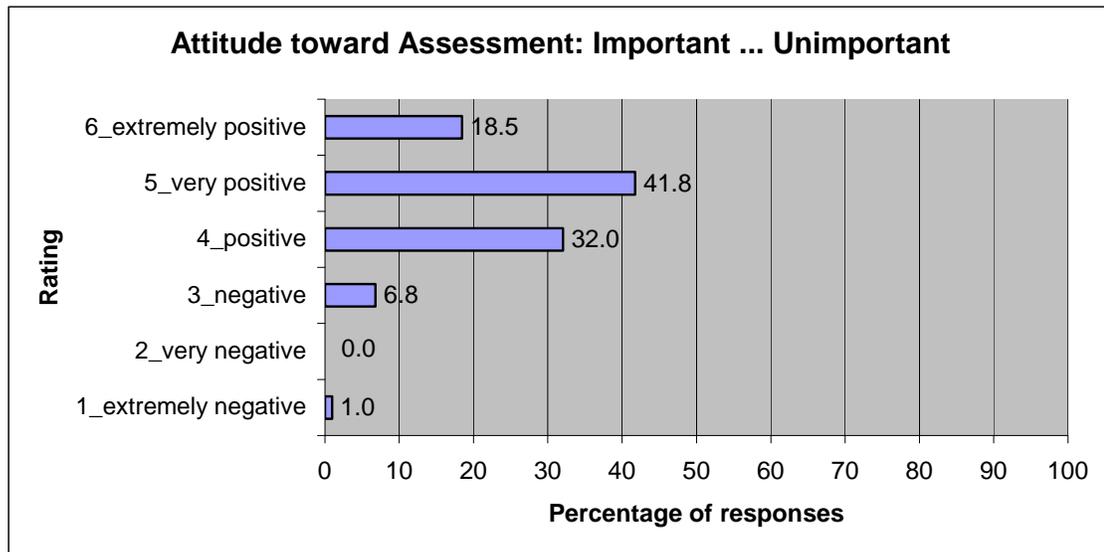


Figure 4.21: Important ... Unimportant

The response to Important ... Unimportant was 92.3%, representing the responses of “extremely”, “very positive” and “positive” in Figure 4.21. The response rate for the “negative”, “very negative” and “extremely negative” was 7.8%. This response signifies that the teachers felt very positive about the importance of the particular assessment process, which is the teaching portfolio. This indicates that the teaching portfolio is an essential tool for teaching the subject Consumer Studies.

#### 4.4.5 Good ... Bad

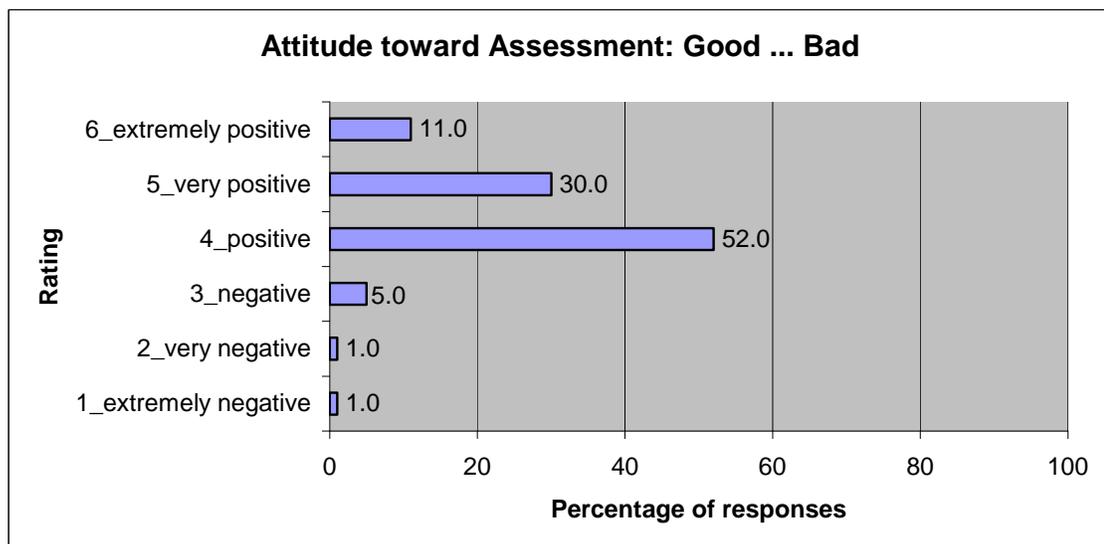


Figure 4.22: Good ... Bad

In Figure 4.22, the teachers responded to the adjective Good ... Bad with a positive response of 93%. Figure 4.24 also illustrates that the response to “negative”, “very negative” and “extremely negative” was low (7%). This signifies that a small percentage of teachers viewed the assessment process as negative. Ford & Ohlhausen (1991: 3) confirmed that the teaching portfolio served as a valuable tool in the assessment process, because it allowed teachers to reflect upon their roles as facilitators of knowledge rather than experts of knowledge.

#### 4.4.6 Fair ... Unfair

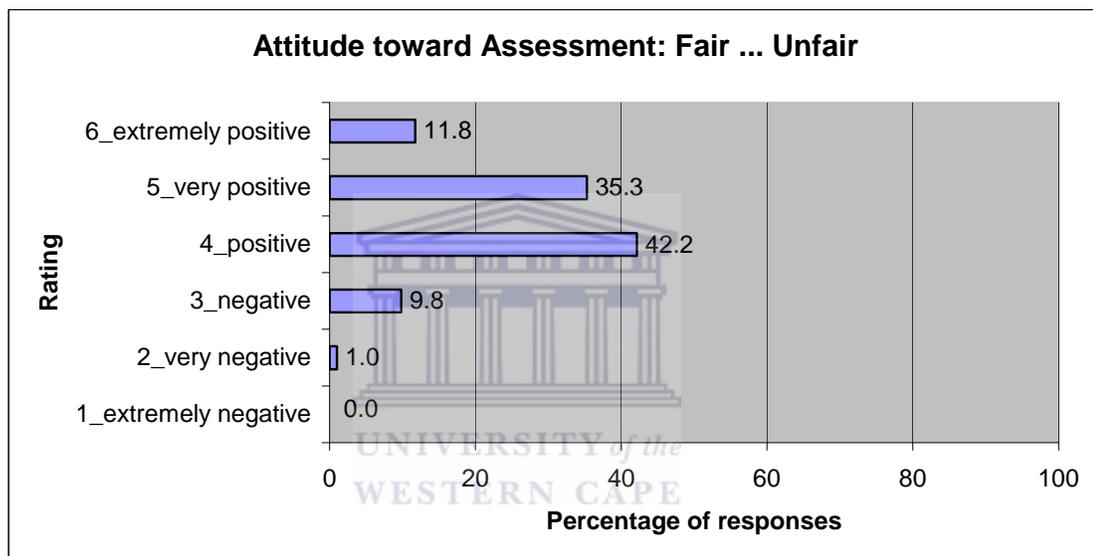


Figure 4.23: Fair ... Unfair

In response to Fair ... Unfair, 89.3% of teachers expressed a positive attitude, which meant that they saw the assessment process as a fair, and not an unfair process. Only 10.8% of the teachers regarded this assessment process as unfair (Figure 4.23). The respondents in a study by Attinello *et al.* (2006: 144) indicated that a perceived benefit of the teaching portfolio was that it allowed teachers to document achievements and express interest in learning activities to administrators. Respondents indicated that this kind of communication between teachers and administrator ensured that the teaching portfolio was fairer than the observation process. The educators of the WCED probably had a similar attitude when they rated the teaching portfolio as a fair process.

#### 4.4.7 Reputable ... Disreputable

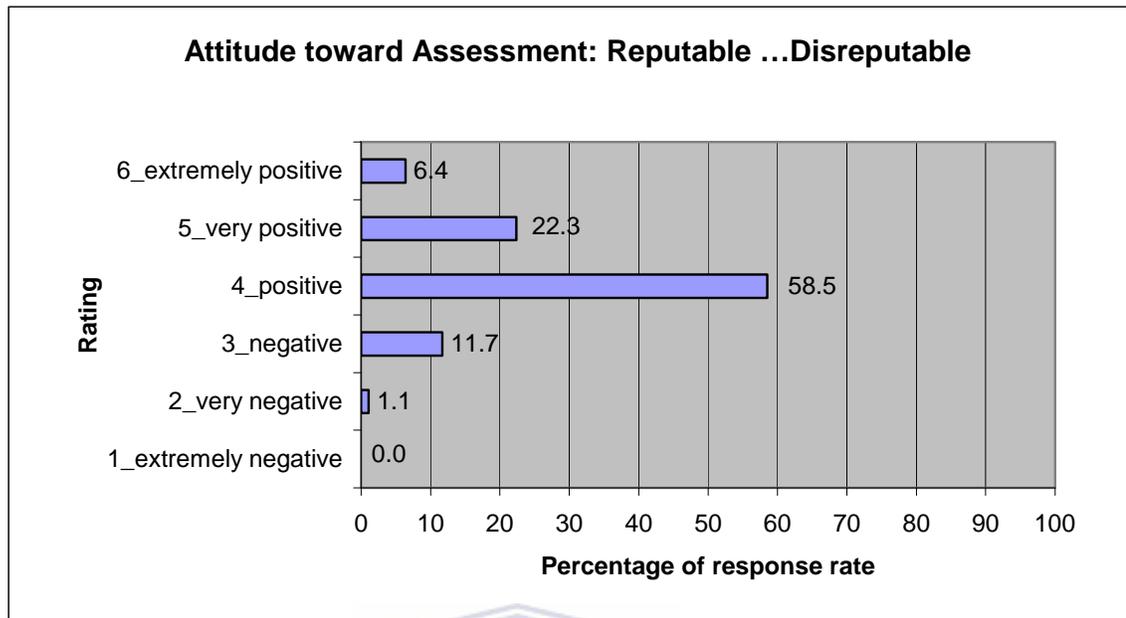


Figure 4.24: Reputable ... Disreputable

Figure 4.24 graphically illustrates that most of the respondents' attitude was "extremely positive", "very positive" or "positive" (87.2%) for Reputable ... Disreputable. There was a large decrease from 5 ("very positive") to 4 ("positive"). The difference between the largest frequency and the second largest frequency was 36.2% in comparison to the other adjectives. The negative response of "negative", "very negative" and "extremely negative" was 12.8%. This indicates that there was a low response to the negative end of the scale (Figure 4.24). The positive response to Reputable ... Disreputable showed that teachers regarded this particular means of assessment, namely the teaching portfolio used in the subject area of Consumer Studies, as a reputable process. A study by Wray (2007: 1145-1146) indicates that the teaching portfolio used in the assessment process assisted student teachers to focus on their teaching philosophies and teaching strategies when selecting evidence for the teaching portfolio, and in turn linked these two concepts to their teaching practice. The fact that the teaching portfolio allowed student teachers to make a clear link between theory and practice had a positive impact on their teaching practice. In this regard the study by Wray (2007) confirms that the teaching portfolio is a reputable assessment tool.

#### 4.4.8 Flexible ... Rigid

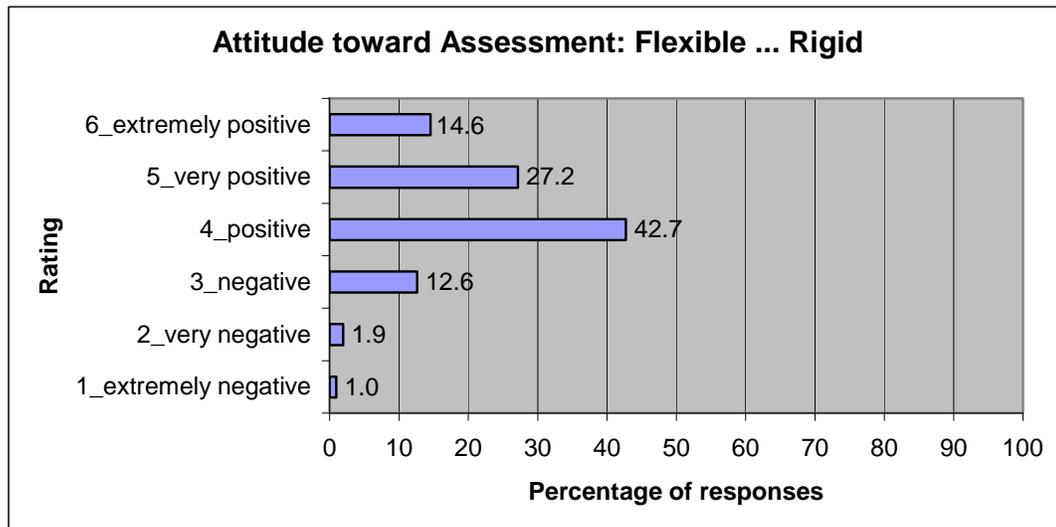


Figure 4.25: Flexible ... Rigid

The frequency (84.5%) of responses for Flexible ... Rigid was positive and included the responses of “extremely positive”, “very positive” and “positive” (Figure 4.25). The frequency for the negative responses of “negative”, “very negative” and “extremely negative” was 15.5% (Figure 4.25). The response rate towards “very negative” for Flexible ... Rigid was higher than for previous adjectives (1.9%). In a study by Tigelaar *et al.* (2006: 376) the educators in the study perceived the structure of the teaching portfolio as too rigid. The perceptions were that the assignments gave too much detail and were too restrictive and directive. Suggestions to minimise the rigidity of the teaching portfolio included flexibility in the type of assignments selected for the teaching portfolio. In addition, the conversation procedures had to be open-ended and more opportunities had to be provided for meeting teachers’ learning needs. The positive attitude to the flexibility of the teaching portfolio indicated that teachers felt that they had flexibility regarding the type of evidence placed in the portfolio. The Department of Education (2005b: 17) states that the teaching portfolio should include all the assessment tasks carried out by the learners. The Department of Education (2007: 8-14) provides suggestions of assessment tasks to be included in the teaching portfolio for the FET phase, which is Grades 10-12 for Consumer Studies. The assessment tasks amount to seven, comprising tests, examinations and other tasks that could include written assignments or surveys. Therefore teachers at WCED have the flexibility to compile a teaching portfolio of evidence selected by the teacher.

#### 4.4.9 Relax ... Tense

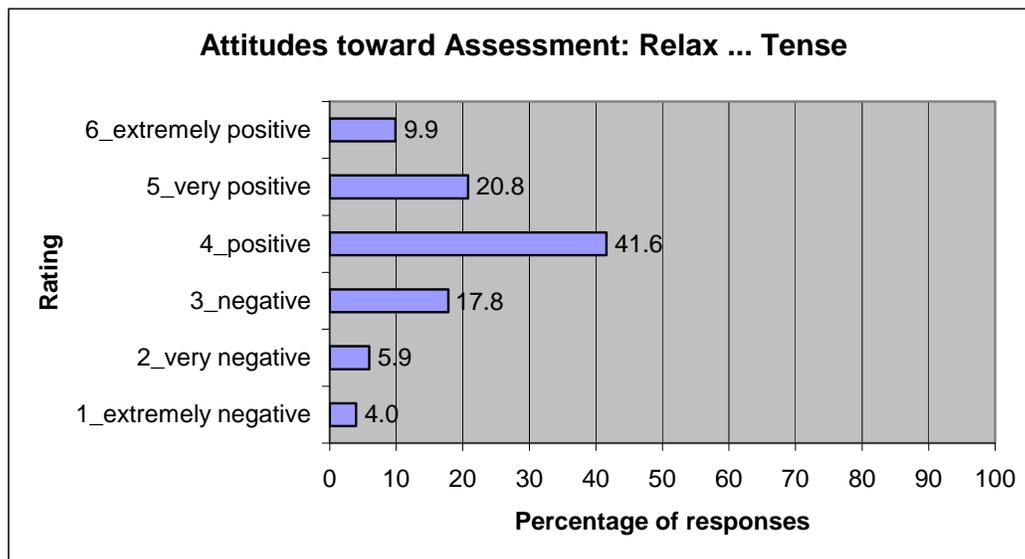


Figure 4.26: Relax ... Tense

Figure 4.26 graphically illustrates the highest response for the adjective Relax ... Tense, which was 72.3% and corresponded to the responses of “extremely positive”, “very positive” and “positive”. For Relax ... Tense there was a higher response rate to the negative end of the ordinal scale, as found in “negative”, “very negative” and “extremely negative” (27.7%). This negative response rate was higher than for the adjectives Worthless...Valuable, Successful...Unsuccessful, Efficient...Inefficient, Important...Unimportant, Good...Bad, Fair...Unfair, Reputable...Disreputable and Flexible...Rigid. This was an indication that a substantial number of teachers harboured a tense attitude toward the assessment process. The higher negative response could mean that teachers were frustrated by the amount of time consumed by administrative tasks during and after completion of the assessment process. Respondents in a study conducted by Ford & Ohlhausen (1991: 3) and Wray (2007: 1146) indicated that the teaching portfolio was time-consuming, which may explain teachers’ tense attitude toward the teaching portfolio. However, the majority of the teachers had seen the assessment process as positive, as responses tended toward the adjective “relaxed”. A study by Slater (1997: 317) supported the teaching portfolio as relaxing the assessment process, because student teachers could consult a variety of sources to obtain information for meeting the outcomes of a course, conduct discussions about the content outside the classroom and select their own items for the teaching portfolio. The teaching portfolio was a more relaxed process compared to the

traditional assessment method of testing. Respondents in the study by Slater (1997: 317) reported that the development of a teaching portfolio made class attendance enjoyable, because portfolio assessment was the main assessment tool in the classroom. Respondents also indicated that portfolio assessment reduced the pressure of rigorous note-taking, which allowed them to pay more attention to the content being dealt with in class.

The respondents of the WCED would probably experience the same anxiety when a subject advisor carried out inspection by evaluating a teacher’s lesson, but subject advisors now inspect the teaching portfolio to determine teaching and assessment practices carried out in the classroom.

#### 4.4.10 Summary of attitudes towards the assessment process

**Table 4.20: Summary of attitudes towards the assessment process**

Response rate	Valuable	Successful	Efficient	Important	Good	Fair	Reputable	Flexible	Relaxed
1 “extremely negative”, “very negative” & “negative”	6.5	10.0	11.0	7.8	7.0	10.8	12.8	14.7	27.7
2 “positive”, “very positive” & “extremely positive”	93.5	90.0	89.0	92.2	93.0	89.2	87.2	85.3	72.3
Average	1.9	1.9	1.9	1.9	1.9	1.9	1.9	1.9	1.7

Table 4.20 represents a summary of the response to the bipolar adjectives for the attitudes toward the assessment process. The response rates of “1 extremely negative”, “2 very negative” and “3 negative” were combined to provide a response for the “negative” end of the scale and was represented by “1” in Table 4.20. The response rates of “4 positive”, “5 very positive” and “6 extremely positive” were combined to provide a response for the “positive” end of the scale and was represented by “2” in Table 4.20. In Table 4.20 a yellow-coloured strip highlighting the digits show that the most frequent response by the teachers favoured the positive end of the scale, representing “4 positive”, “5 very positive” and “6 extremely positive”.

Responses to the adjectives supplied in Figures 4.18, 4.19, 4.20, 4.21, 4.22, 4.23, 4.24, 4.25 and 4.26 show that all the responses increased from 6 (“extremely positive”) to 4 (“positive”), and decreased from 3 (“negative”) to 1 (“extremely negative”). Figures in the blue-coloured strip therefore indicate that the percentage of responses to adjectives on the negative half of the scale was low, except for the adjective Relax ...Tense, which elicited the highest response to the negative end of the scale in Table 4.20.

In Table 4.20, in the column “Valuable” the highest response rate fell in the positive end of the scale. Thus the teachers were sure about how they regarded the importance of the assessment process, suggesting a positive attitude to the assessment process which in this case was the teaching portfolio. The students in the study conducted by Robinson & Bennett (n.d.) supported the use of the teaching portfolio as an assessment tool (Robinson & Bennett, n.d.: 5). Shimo & Apple (2002: 57) further confirm the positive attitude towards the teaching portfolio as an assessment method by indicating that portfolio assessment can be an enjoyable learning tool which students can reflect upon after completion of their course.

It can be concluded that the teachers felt positive toward the assessment process, which is the teaching portfolio, because their responses tended towards the positive component of the bipolar adjectives. However, a higher percentage also experienced the assessment process as tense.

#### **4.5 PERCEPTIONS OF CONSTRAINTS TOWARDS THE ASSESSMENT PROCESS**

For this section of the questionnaire, respondents had to rate the constraints or barriers that impacted on the assessment process. Nine statements were used to determine the teachers' perceptions of the constraints toward the assessment process. The teachers had to use a 4-point scale to rate their perception of each constraint. The scale ranged from 1 (“strongly disagree”) to 4 (“strongly agree”). Once the researcher had collected the data, it was analysed and each constraint was graphically displayed according to how the teachers responded to the constraints. An abbreviated form of the statement was given as the heading for each graph. The graphs were grouped into

themes prior to the discussion. The data was discussed to describe the Consumer Studies teachers' perceptions about the assessment process (sub-objective 3).

#### 4.5.1 Assessment methods in Consumer Studies

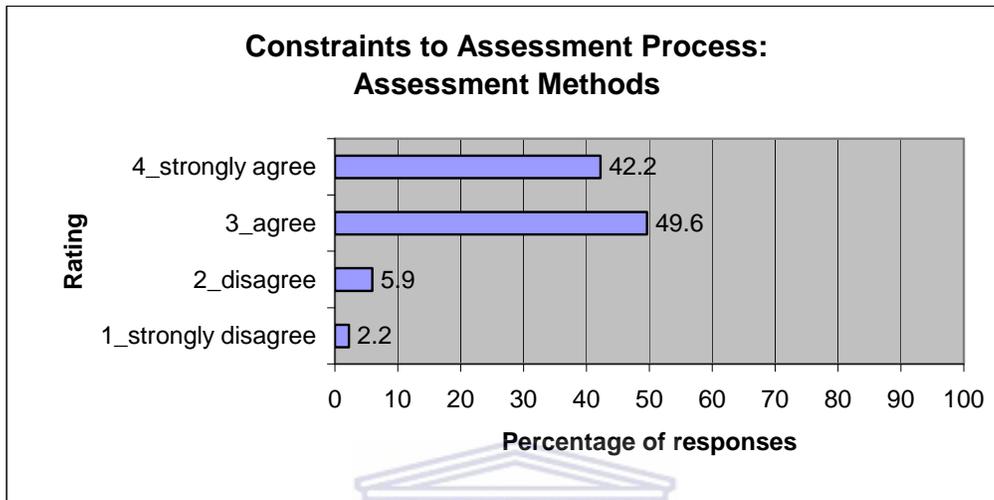


Figure 4.27: Assessment methods

The response to the constraint “I decide what assessment methods to use in the subjects I teach”, which is Consumer Studies, was 3 “agree” and 4 “strongly agree”, with a response rate of 91.8% as displayed in Figure 4.27. There were responses to the most negative statements of “disagree” and “strongly disagree”, but they fell under the two lowest response rates of 8.1%. This indicates that the teachers responded positively to the fact that they could decide which assessment methods to use in the subject Consumer Studies. The Department of Education (2007: 7) states that “teachers are encouraged to use a variety of assessment activities, methods, tools and forms when assessing the practical and theoretical components of Consumer Studies”.

## 4.5.2 Additional planning time

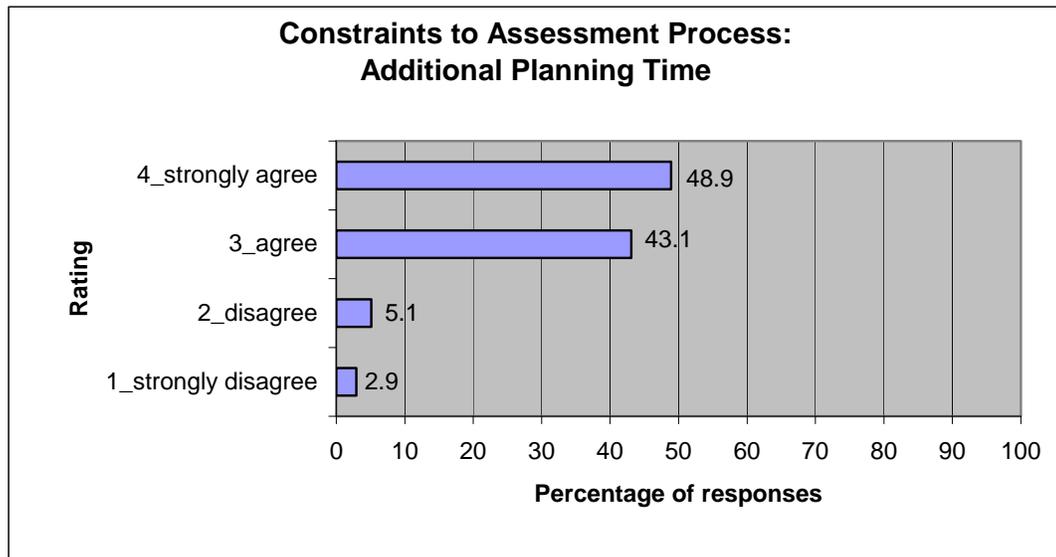


Figure 4.28: Additional planning time

In Figure 4.28, the teachers “agreed” and “strongly agreed” (92%) that if they were given additional time, they would be able to apply the assessment methods more effectively. Apple & Shimo (2002: 57); Attinello *et al.* (2006: 143); and Tigelaar *et al.* (2006: 375–376) confirm the perception of additional planning allowing teachers to use the assessment methods more effectively, and indicate that the compilation of the teaching portfolio is time-consuming. There were teachers who responded to the negative responses of “disagree” and “strongly disagree”. However, the negative responses (8%) were limited.

The reason for teachers agreeing to this constraint, is that the OBE approach requires teachers to perform many administrative tasks to keep track of each learner’s progress. They feel that these tasks take up too much unnecessary time which could otherwise be spent on lesson planning, teaching and assessment tasks.

### 4.5.3 Available equipment

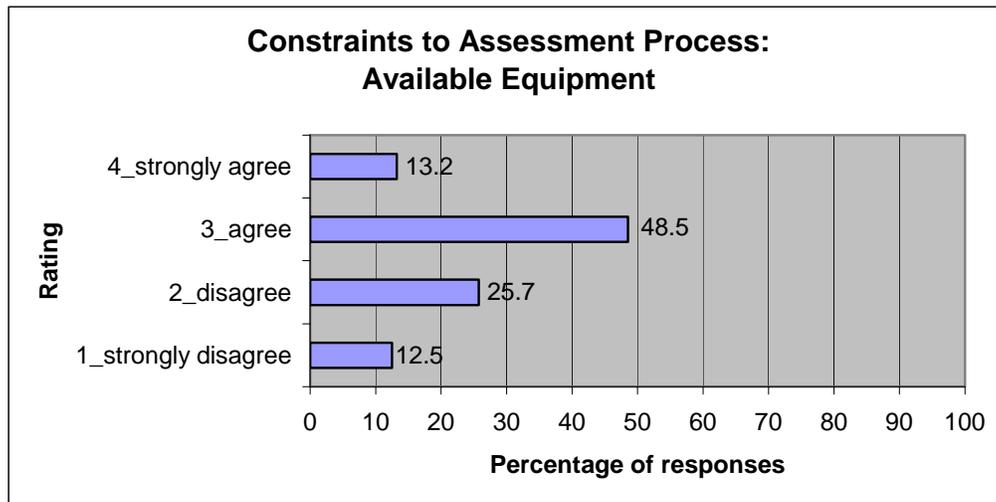


Figure 4.29: Available equipment

In Figure 4.29 the majority of the teachers responded to 3 “agree” and 4 “strongly agree” (61.7%) when rating the availability of equipment in their school for use in scoring tests. This is an indication that the teachers agree that equipment or instruments are available for marking learners’ tests in their school. This equipment or instruments can also be called rubrics. A high percentage of teachers responded to 1 “strongly disagree” and 2 “disagree” (38.2%), compared to their responses to “constraints of assessment methods and planning time”. They clearly felt that their schools did not have the equipment or instruments for marking the learners’ tests.

#### 4.5.4 Quality published assessment materials

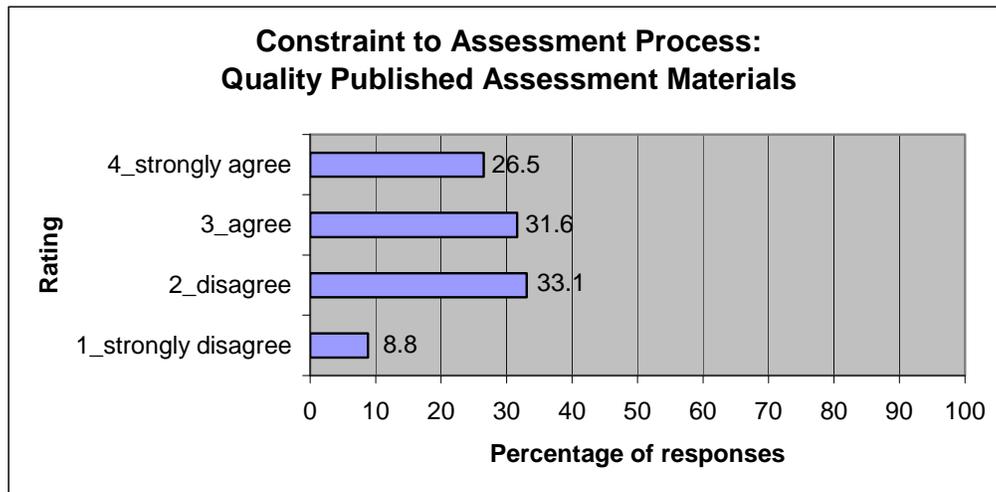


Figure 4.30: Quality published assessment materials

Figure 4.30 displays the highest percentage of responses to 3 “agree” and 4 “strongly agree” (58.1%) with regard to quality published assessment materials being hard to find. This result implies that teachers find it difficult to obtain assessment material. The reason for teachers agreeing to this statement is that they either do not have access to quality published assessment materials due to a lack of funds for purchasing these assessment materials, or the school has not received the assessment materials.

However, the response to the negative end of the scale, which is 1 “strongly disagree” and 2 “disagree”, was 41.9%, which was close to the positive end of the scale. This response indicated that a substantial number of the respondents were indeed able to find quality published assessment materials.

#### 4.5.5 Funds available

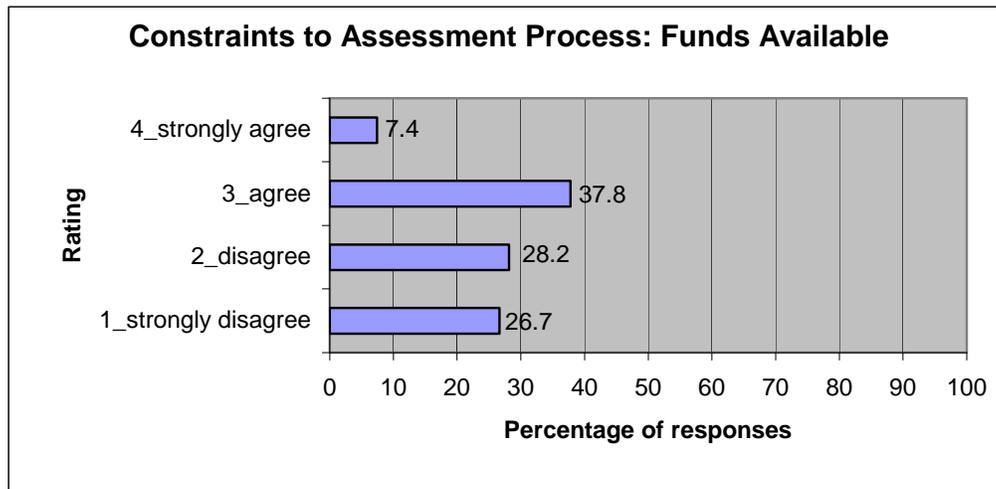


Figure 4.31: Funds available

In Figure 4.31, 54.9% of the respondents 1 “strongly disagree” and 2 “disagree” that funds available for the purchasing of published assessment materials was a constraint in the development of the teaching portfolio. This response rate was close to the response of “agree” or “strongly agree”. The responses of disagreeing to funds being available for purchasing published assessment material indicated that the majority of the teachers had access to funds for assessment material. The funds for the purchasing of published assessment materials would come from the school’s budget. This implies that schools allocate funding for Consumer Studies assessment material or textbooks.

In Figure 4.31, the lowest response was obtained for the response of 3 “agree” and 4 “strongly agree” by the teachers. This indicates that 45.2% teachers agreed that funds available to purchase published assessment materials is a constraint in the development of a teaching portfolio. Either the schools do not have funds, or they do not allocate funds to purchase assessment material, or teachers have to personally finance assessment materials.

The response to this constraint indicates that the majority of the teachers do have funds to purchase published assessment material. However it is a matter of concern, because there is a percentage of the teachers in the Western Cape Education Department that do not have access to funding to purchase published assessment materials.

#### 4.5.6 Information on published assessment materials

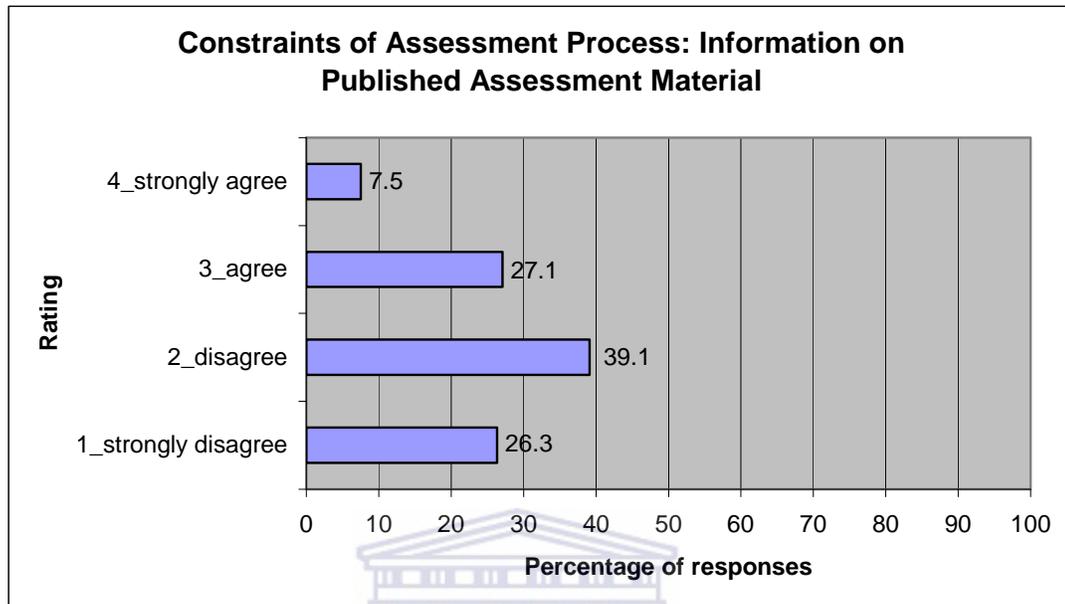


Figure 4.32: Information on published assessment materials

Figure 4.32 displays the highest percentage responses of 1 “strongly disagreed” and 2 “disagreed” (65.4%) to “I do not have information on published assessment material.” This statement was posed in a negative way, thus the response to this statement should be interpreted in the positive, “agreeing” that there are teachers that have information about quality published assessment materials. This response rate means that there were respondents who had this information. The positive perception of this constraint is supported by student teachers in a study by Slater (1997: 317), finding that teaching portfolio assessment was a motivating factor that encouraged them to consult textbooks or readings. Therefore, these teachers, while developing a teaching portfolio, would consult various published assessment materials.

In the positive domain of the scale where 3 denotes “agree” and 4 “strongly agree”, the response indicating that it is hard to find quality published assessment material was 34.6%. According to this response there were teachers who did not have information about where to find the published assessment materials. The reason could be that they had not been informed about where to obtain the relevant information.

Figure 4.30, Figure 4.31 and Figure 4.32 fall under the theme of published assessment materials. The response to these statements was in the positive domain of the response scale, except for Figure 4.32 which had a negative response. Therefore, the response shows that the teachers had access to quality published assessment material.

#### 4.5.7 Educator courses

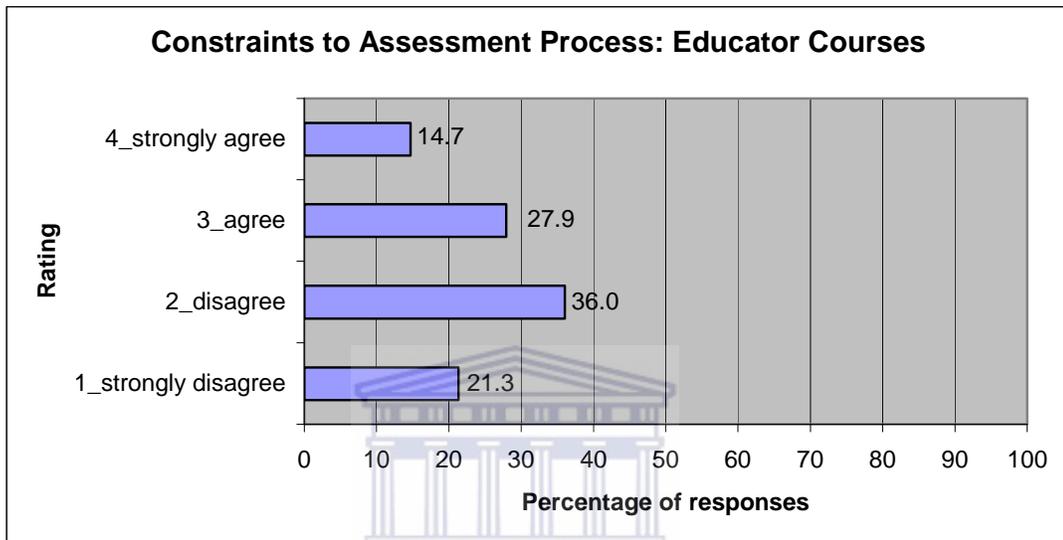


Figure 4.33: Educator courses

The highest response to “the constraint educator courses were of little help in preparing me to assess learner learning” was 1 “strongly disagreed” and 2 “disagree”, with a response rate of 57.3% depicted in Figure 4.33. This statement was posed in a negative way, as was the constraint in Figure 4.32 (information on published assessment material). The response to this statement should therefore be interpreted in the positive, in terms of “agreeing” that there were teachers who regarded the educator courses as helpful in assessing learner learning.

In Figure 4.33, 42.6% was obtained for the 3 “agree” and 4 “strongly agree”, with these teachers feeling that the educator courses did not provide assistance in assessing the learners' learning. The reason for this feeling could be that teachers did not attend the educator courses, or did not know how to apply the information acquired at the educator courses in assessing the learners' learning.

#### 4.5.8 In-service activities

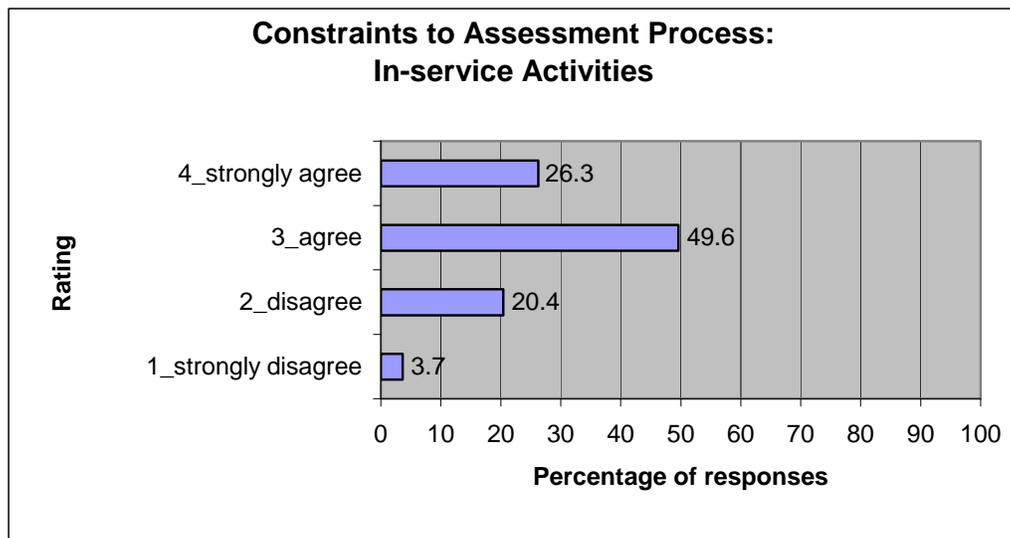


Figure 4.34: In-service activities

In Figure 4.34, the highest score of 75.9% was obtained for the constraint of “in-service activities have helped develop my assessment skills”, responding to 3 “agree” (49.6%) and 4 “strongly agree” (26.3%). On the other end of the scale, 24.1% of the respondents chose 1 “strongly disagreed” and 2 “disagreed”. A small percentage of teachers (3.7%) strongly disagreed that the in-service activities did not develop their assessment skills.

According to the responses the majority of the teachers felt that in-service activities did assist them to develop their assessment skills. These in-service activities included workshops and in-service courses, such as the Advanced Certificate in Education: Consumer Studies, which are conducted during the school term and during the school vacation. These courses and workshops are planned by the Western Cape Education Department and offered in conjunction with the Department of Human Ecology at the University of the Western Cape.

Figure 4.33 (educator courses) and Figure 4.34 (in-service activities) are linked to further educator training and development, and in both cases the teachers were positive that teachers’ courses and in-service activities assisted them in developing their assessment skills in Consumer Studies education.

#### 4.5.9 Assistance with assessment activities

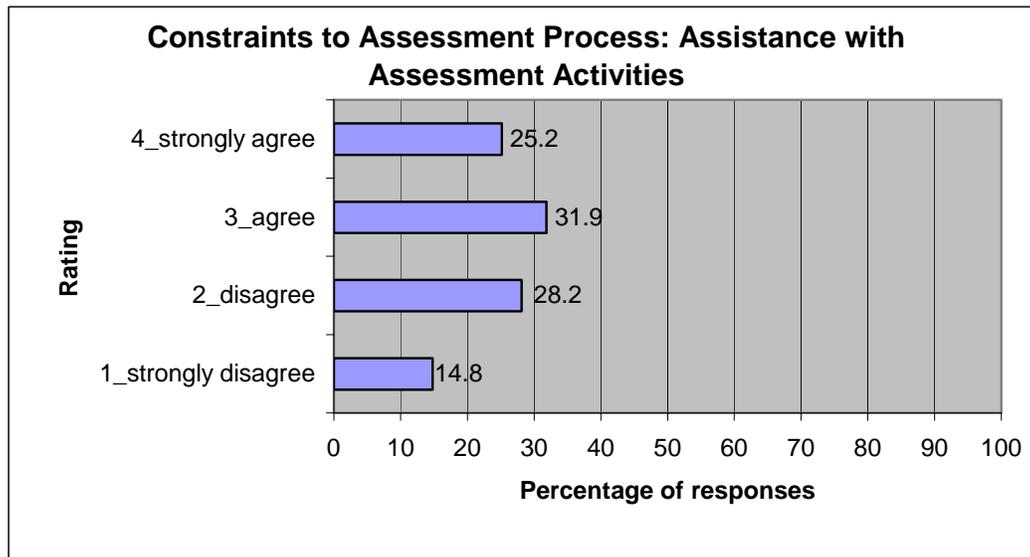


Figure 4.35: Assistance with assessment activities

In Figure 4.35 the highest percentage of responses was obtained by 3 “agree” and 4 “strongly agreed” (57.1%) for the constraint “I have assistance in preparing student assessment activities.” The response to 4 “strongly agree” shows that there were certain teachers who strongly agreed that they had assistance with the preparation of student assessment material. The teachers also felt that they received assistance when preparing assessment activities for their learners. While visiting the various EMDCs where the questionnaire was administered, the researcher observed that the subject advisors informed the teachers about the type of assessment activities that could be implemented. The subject advisors either requested certain teachers who had good ideas about assessment activities to bring examples of these assessment items; or the subject advisors would conduct workshops where they provided teachers with actual assessment items. This researcher was personally involved in a workshop of this nature (Breede River/Overberg EMDC, Worcester, 17 November 2005 at 14h00).

It can therefore be concluded that the majority of the responses for the constraint “I have assistance in preparing student assessment activities” lie in the positive domain of the rating scale.

#### 4.5.10 Summary of perceptions of constraints towards the assessment process

**Table 4.21: Summary of constraints towards the assessment process**

Response rate	Assessment methods	Additional planning time	Equipment available	Quality published materials	Funds available	Educator courses	In-service activities	Assistance	Information
1 “strongly disagree” & “disagree”	8.1	8.0	38.2	41.9	54.8	57.4	24.1	43.0	65.4
2 “agree” & “strongly agree”	91.9	92.0	61.8	58.1	45.2	42.6	75.9	57.0	34.6
Average	1.9	1.9	1.6	1.6	1.5	1.4	1.8	1.6	1.3

Table 4.21 is a summary of the results for perceptions of constraints towards the assessment process. The response rates of “1 strongly disagree” and “2 disagree” were combined to provide a combined response for the scale of “disagree. The response rates of “3 agree” and “4 strongly agree” were combined to provide a combined response for the scale of “agree”. Respondents positively chose “agree” and “strongly agree” as their choice for the majority of the constraints toward the assessment process, which is highlighted by the yellow-coloured digits. The green-coloured digits indicate that the teachers perceived these two constraints on the negative end of the scale, represented by “disagree” and “strongly disagree”. These two constraints were “educator courses were of little help in preparing me to assess learner learning” and “I do not have information on published assessment materials”, because the particular statements were written in a negative format. As a consequence the teachers’ responses were not concentrated in one area only (Table 4.21).

All the responses to constraints of the teaching portfolio fell into the positive end of the scale, except for “educator courses were of little help in preparing me to assess learner learning” and “I do not have information on published assessment materials”, because these statements were written in a negative format. It can therefore be concluded that the teachers perceived neither of the constraints as barriers towards the assessment process.

## **4.6 FACTORS RELATED TO THE DEVELOPMENT OF THE TEACHING PORTFOLIO**

The factors relating to the teaching portfolio were divided into three sections, namely, skills, activities and benefits. Under each of these factors a particular number of skills, activities and benefits were given. The teachers had to tick off the skills; activities and benefits that they thought could be applicable to the compilation of the teaching portfolio. The number of skills, activities and benefits that could be ticked off by the teachers ranged from zero to the maximum number of skills, activities and benefits listed in the questionnaire. The data was discussed to identify the factors affecting the development of the Consumer Studies teaching portfolio (sub-objective 4).

Once the data had been collected for the various aspects of the teaching portfolio, it was analysed and displayed in a graphical format. For each aspect of the teaching portfolio that was discussed, an abbreviated form of the skill, activity or benefit phrase was entered into the graphs. A table with the complete phrase describing the skill, activity or benefit was supplied next to each graph. A table with the mean responses was ranked in descending order of response. The skills attitudes, activities and benefits of the teaching portfolio were discussed under the three aspects of OBE, namely knowledge, skills and attitudes.

### **4.6.1 Skills required compiling a teaching portfolio**

Teachers had to select the skills they felt were required to compile a teaching portfolio. The six skills listed in the questionnaire were selected by the teachers. The researcher kept in mind that one educator could select more than one of the skills in the list.

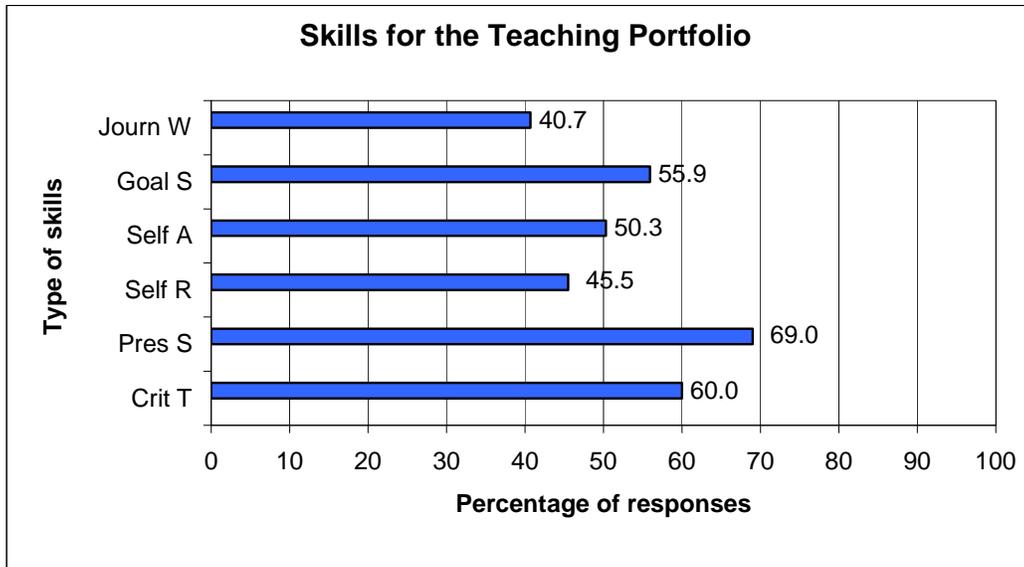


Figure 4.36: Skills for the teaching portfolio

Table 4.22: Key to skills for the teaching portfolio

Abbreviated skill phrase	Type of skills
Journ W	Journal writing
Goal S	Goal setting
Self A	Self-assessment
Self R	Self-reflection
Pres S	Presentation skills
Crit T	Critical thinking

The skills were listed in descending order of the response rate in Table 4.23.

Table 4.23: Response rate to skills for the teaching portfolio in descending order

Type of skills	Percentage of responses
Presentation skills	69%
Critical thinking	60%
Goal setting	55.9%
Self-assessment	50.3%
Self-reflection	45.5%
Journal writing	40.7%

In Table 4.23 and Figure 4.36, 60% of the respondents ticked the skill of critical thinking, which falls under the knowledge aspect of OBE. These results confirm the findings of a study conducted by Chapman *et al.* (2001: 295) indicating that the compilation of a teaching portfolio allowed librarians to think critically and reflect upon teaching techniques, learning styles, content of instruction sessions and evaluation of teaching styles.

In Figure 4.36, under the skills aspect of OBE, 69% of the teachers responded to presentation skills, 55.9% to goal setting and 40.7% to journal writing as skills required for compiling a teaching portfolio. In Table 4.23 presentation skills had the highest response rate of the various skills required to compile a teaching portfolio, thus confirming the findings of Campbell & Brummet (2002: 30). The appearance of a teaching portfolio must be appealing to the reader. For this reason it is critical that the cover, organisational scheme and page layout are reflected in the content and overall design of the teaching portfolio. The primary objective of the presentation of the teaching portfolio is to be assembled into a coherent, attractive and usable entity. The portfolio can either be presented in a three-ringed binder, which is the most generally used format, or in a notebook with zippers, or on a videotape, compact discs or in plastic sleeves that would make it unnecessary to punch holes into the teaching portfolio (Campbell & Brummet, 2002: 30).

Lyons (1999: 64) reiterates the skill of goal setting in a teaching portfolio by pointing out that a teaching portfolio should show evidence of a teacher's goals and standards demonstrated in the classroom. Seldin *et al.* (1995: 13) further elaborates on the skill of goal setting by stressing that the goals set by teachers should be accompanied by a plan setting out how the goal will be achieved. It should indicate how their teaching will improve in the classroom.

In the literature, the skill of journal writing is not mentioned as a prerequisite for compiling a teaching portfolio, but reflection is a meaningful tool for compiling the portfolio. Painter (2001: 32) states that thoughtful reflection is the key to portfolio success. Lyons (1999: 64) and Painter (2001: 32) do not refer to journal writing, but indicate that with reflection a teacher should present a narrative with each piece of evidence included in the teaching portfolio. A narrative is a set of reflections or

critical interrogations accompanying each artefact. This will serve to document a teacher's experience of teaching and learning.

50.3% of the respondents indicated that self-assessment, and 45.5% that self-reflection were skills required to compile a teaching portfolio. These skills fall under the aspect of attitudes regarding OBE. The skill of self-assessment is supported by Riggs & Sandlin (2000: 25) who are of the opinion that the compilation of a teaching portfolio is a self-assessment activity for the teacher, because through the collection of evidence for the teaching portfolio, areas with strong evidence of meeting professional standards and areas that lack evidence are identified. Weak areas identified in the teaching portfolio could motivate teachers to pursue professional development (Riggs & Sandlin, 2000: 26). Chapman *et al.* (2001: 296) support the skill of self-reflection as being of great benefit to teaching portfolio development.

In conclusion, of the skills required to compile a teaching a portfolio, self-reflection as well as journal writing, or as referred to in the literature, narratives, offer decided benefits. Painter (2001: 32) and Wyatt & Looper (2004: 33) argue that without reflection a teaching portfolio serves as a scrapbook filled with artefacts, showing little evidence of a teacher's intellectual and professional ideas. However, all the other skills, namely goal setting, self-assessment, presentation skills and critical thinking are necessary to produce a teaching portfolio that would serve as a valuable assessment tool.

#### **4.6.2 Reconsideration of activities stimulated by the teaching portfolio**

The teachers had to select the activities that they felt were stimulated by the teaching portfolio. They selected the five activities that were listed in the questionnaire after considering all the activities for selection. The researcher kept in mind that one educator could select more than one of the activities in the list.

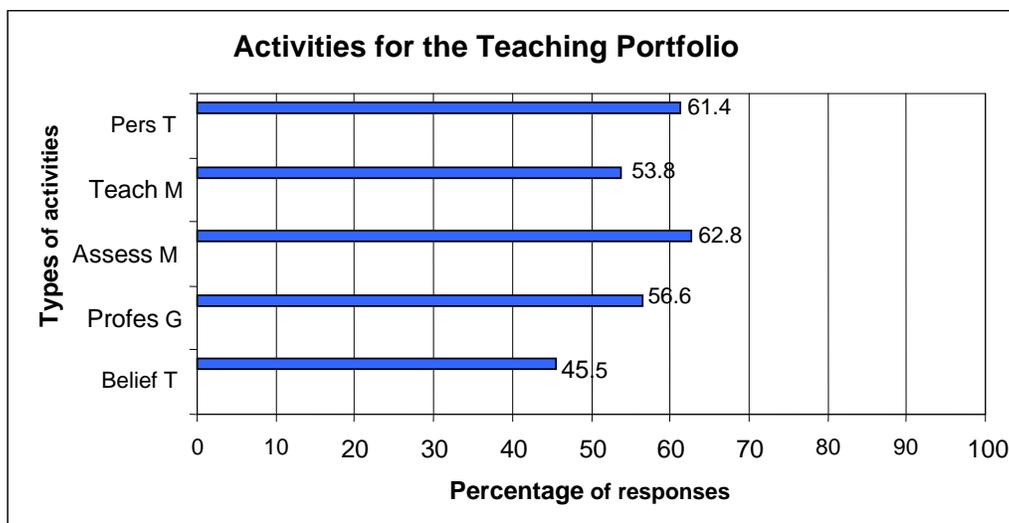


Figure 4.37: Activities for the teaching portfolio

Table 4.24: Key to activities for the teaching portfolio

Abbreviated Activity phrase	Type of activity
Pers T	Personal teaching outcomes
Teach M	Teaching methods
Assess M	Assessment methods
Profes G	Professional growth
Belief T	Beliefs about teaching and learning are reflected in your conduct as a teacher

The activities were listed in a descending order of choice in Table 4.25.

Table 4.25: Response rate to activities for the teaching portfolio in descending order

Type of activities	Percentage of responses
Assessment methods	62.8%
Personal teaching outcomes	61.4%
Professional growth	56.6%
Teaching methods	53.8%
Beliefs about teaching and learning are reflected in your conduct as a teacher	45.5%

In Figure 4.37, 61.4% of the respondents indicated that personal teaching outcomes were reconsidered when the teacher was compiling a teaching portfolio. Personal teaching outcomes fall under the knowledge aspect of OBE. In the literature, researchers refer to learning outcomes of the teacher instead of personal teaching outcomes. Personal teaching outcomes or learning outcomes have been identified as an activity for the teaching portfolio. In the selection of evidence for the teaching portfolio as a learning process; the teacher's performance is evaluated and strengths and weaknesses identified that will allow for the improvement of the teacher's learning outcomes or goals (Klenowski, 2002: 30).

The responses to assessment methods and teaching methods amounted to 62.8% and 53.8% respectively in Figure 4.37, and are categorised under the aspect of skills in OBE. Assessment methods obtained the highest response rate in Table 4.25. This response confirms the study by Mues & Sorcinelli (2000: 7) who claim that assessment is one of the items that must be evident in the teaching portfolio. This response further supports the WCED (2001: 8) in clearly specifying that the teaching portfolio is a collection of all the instructions, assessment criteria and rubrics used for CASS tasks to be performed by learners. Teaching methods and strategies are jointly regarded as one of the items included in the teaching portfolio. In this item teachers have to describe how teaching takes place in the classroom, referring to teaching methods, types of media used in the classroom, learner activities and learning content (Mues & Sorcinelli, 2000: 6; Mahaye and Jacobs in Jacobs *et al.*, 2004: 175). Seldin (1993: 7; 2000: 2) reiterates that evidence of teaching methods categorised as material to be placed in the teaching portfolio by the teacher, must be included. This confirms that the teaching portfolio stimulated teachers to reconsider teaching methods while compiling the portfolio.

Professional growth and beliefs about teaching and learning are reflected in the activities of a teacher, categorised as attitudes of the teacher under the aspects of OBE. In the literature, reference is made to professional growth or professional development, and therefore these two concepts will be used interchangeably. Professional growth elicited a response rate of 56.6% in Figure 4.38. In a study conducted by Chapman *et al.* (2001: 295) the librarians indicated that the function of the teaching portfolio as a tool for professional development was rated positively.

Professional development allowed the librarians to concentrate on aspects that were critical to teaching. Moreover, it identified areas of improvement, clarified teaching philosophy and served as a stimulus to describe the evolution of the librarian's teaching practice. Painter (2001: 32) reinforced professional growth as an activity for reconsideration for the teaching portfolio. He indicated that when selecting evidence for the teaching portfolio, the teacher should also consider whether the artefact reflected the teacher's professional growth and accomplishments. Campbell & Brummet (2002: 27) confirm that the teaching portfolio is important for professional development, which is significant for a teacher's career.

In Figure 4.37 the activity referred to as "beliefs about teaching and learning are reflected in the conduct of a teacher" elicited a response rate of 45.5%, with the lowest response rate in Table 4.25. The teacher's beliefs about teaching and learning that are reflected in the teacher's conduct are referred to as a personal statement, also called the teaching philosophy of a teacher. This teaching philosophy forms the foundation of a teaching portfolio (Mues & Sorcinelli, 2000: 5). Painter (2001: 33) reiterates the importance of a teacher's beliefs when he argues that through the development of the teaching portfolio, a teacher is obligated to think about the beliefs and practices carried out in the classroom. This in turn enables the teacher to identify the gaps between beliefs and teaching practices. Therefore it is confirmed that the beliefs about teaching and learning reflected in the teacher's activities are of the utmost importance when compiling a teaching portfolio.

In conclusion, and referring to the activities considered for the teaching portfolio, the above results prove that as all the activities are influenced by the development of the teaching portfolio, none of them can be omitted when compiling the portfolio. However, beliefs about teaching and learning being reflected in the teacher's conduct elicited the lowest response rate, while it should be the most fundamental activity when compiling a teaching portfolio. Seldin (2000: 2); Darling (2001: 111) and Painter (2001: 31) confirm that the teaching portfolio is not a random accumulation of artefacts; it consists of thoughtfully chosen information about teaching activities supported by evidence to portray its effectiveness.

### 4.6.3 Benefits of the teaching portfolio

Teachers had to select the benefits they regarded as relevant to their experiences with the teaching portfolio. The teachers could select more than one type of benefit from the given list. The researcher kept in mind that one educator could select more than one of the benefits in the list.

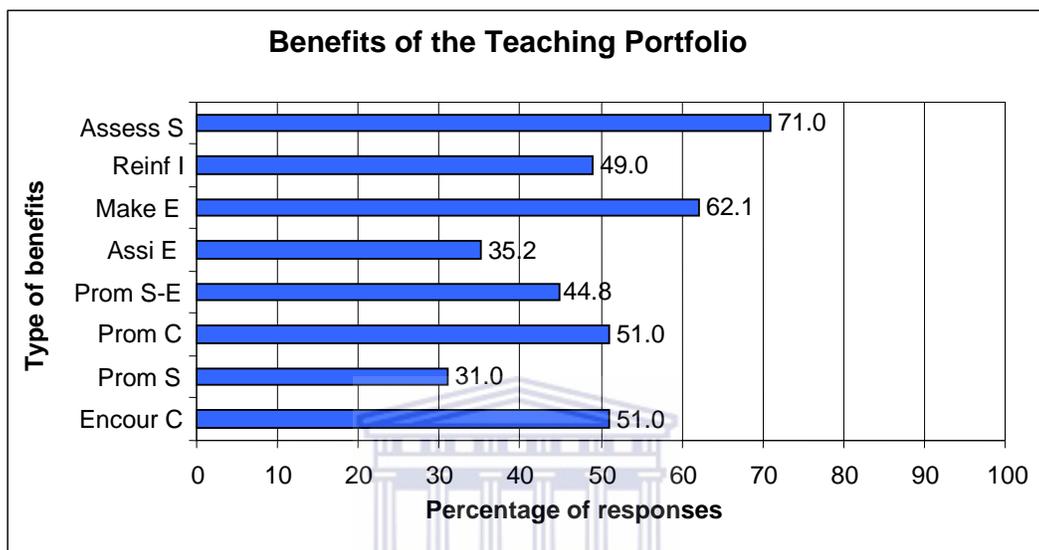


Figure 4.38: Benefits of the teaching portfolio

Table 4.26: Key to benefits for the teaching portfolio

Abbreviated benefit phrase	Types of benefits
Assess S	Assesses weaknesses and strengths
Reinf I	Reinforces instruction and learning
Make E	Makes evaluation more meaningful
Assi E	Assists in developing teaching and career goals
Prom S-E	Promotes self-evaluation and self-awareness
Prom C	Promotes creativity
Prom S	Promotes self-expression
Encour C	Encourages critical thinking

The benefits were listed in descending order of choice in Table 4.27.

**Table 4.27: Response rate to benefits for the teaching portfolio in descending order**

<b>Types of benefits</b>	<b>Percentage of responses</b>
Assesses weaknesses and strengths	71%
Makes evaluation more meaningful	62.1%
Promotes creativity	51%
Encourages critical thinking	51%
Reinforces instruction and learning	49%
Promotes self-evaluation and self-awareness	44.8%
Assists in developing teaching and career goals	35.2%
Promotes self-expression	31%

“Assesses strengths and weaknesses” and “encourages critical thinking” fell under the knowledge aspect of OBE. “Assesses strengths and weaknesses” elicited a response rate of 71% as shown in Figure 4.38, which was the highest response rate of all for the benefits indicated in the questionnaire, as shown in Table 4.27. In a study by Tigelaar *et al.* (2006: 376) teachers indicated that the enjoyment of teaching and the identification of strengths and weaknesses were a perceived benefit. In this study the teachers of the WCED confirmed the same benefit of the teaching portfolio. Klenowski (2002: 30) state that before self-evaluation can take place; the teacher needs to reflect upon strengths and weaknesses of the classroom practice and consider methods that can be used to improve it. Therefore the assessment of strengths and weaknesses is a prerequisite for self-evaluation and should occur before self-evaluation can take place.

In Figure 4.38 the benefit “encourages critical thinking” had a response rate of 51%. When Chapman *et al.* (2001: 295) conducted a study with eight librarians, one of the benefits derived from the study was that the entries used to compile the teaching portfolio allowed the librarians to think critically and reflect upon teaching, learning and assessment practices. Driessen *et al.* (2005a: 1233) conducted a study with mentors who coached medical students in the development of a reflective portfolio. The response from the mentors was that through the development of a teaching portfolio and written reflections, student educators developed a critical attitude towards personal performance and personal development. The studies by Chapman *et*

*al.* (2001: 295) and Driessen *et al.* (2005a: 1233) confirmed that critical thinking was regarded as a benefit in the development of the teaching portfolio.

The benefits of “reinforces instruction and learning”, “makes evaluation more meaningful” and “promotes creativity” constitute the skill aspects of OBE. In Figure 4.38 “reinforces instruction and learning” had a response rate of 49%. Klenowski (2002: 56) discusses teaching and learning under the concept of the teaching portfolio as a formative assessment tool. He states that the transformation of teaching and learning will result if the teacher receives feedback from peers or coaches about teaching achievements, strengths and weaknesses.

The benefit of the teaching portfolio making evaluation more meaningful had a response rate of 62.1%, as shown in Figure 4.38. According to students in the study by Apple & Shimo (2002: 55), the knowledge that the teaching portfolio had to be submitted as a summative assessment tool increased the accountability among group members to complete the teaching portfolio. Failing to submit the teaching portfolio resulted in a student not passing the course. This study confirms that the teaching portfolio is of benefit in making evaluation more meaningful.

In Figure 4.38, the benefit of creativity in compiling a teaching portfolio elicited a response rate of 51%. In a study conducted by Apple & Shimo (2002: 55) the students stated joy of creation and ownership as a reason for active involvement in learning through a portfolio. The students appreciated the ownership of the portfolio as an assessment tool, because originality and creativity could be expressed through the development of the portfolio. With regard to ownership, students were able to make choices about the types of evidence included in the portfolio. They also had to accept responsibility for completing all tasks executed in the English writing course. Creativity as a benefit in this study is thus confirmed by Apple & Shimo (2002: 55). Wyatt & Looper (2004: 8-9) also confirmed the results obtained in this study, by stating that creativity forms part of the compilation and presentation of the teaching portfolio, irrespective of the portfolio’s purpose and the teaching discipline. This concept of joy of creation and ownership can be linked to the promotion of self-expression which was seen as a benefit of the teaching portfolio in this study. Figure 4.38 illustrates the response rate for self-expression as 31%, while it had the lowest

response rate as shown in Table 4.27. The promotion of self-expression falls under the aspect of attitudes in OBE. Other benefits of this category, are the promotion of self-evaluation and self-awareness, both of which assist teachers to develop teaching and career goals.

In Figure 4.38, the benefit of assisting teachers in developing teaching and career goals had a low response rate of 35.2%. This low response indicates that participants do not consider the development of teaching and career goals as a benefit when developing a teaching portfolio. Lyons (1999: 4) confirmed that goals that are identified in the teaching portfolio must be accompanied by a plan of action. In other words, the teacher must specify how each goal will be achieved. Therefore, the development of teaching goals can be seen as a benefit of compiling the teaching portfolio.

The benefit of self-evaluation and self-assessment elicited a response rate of 44.8%, as depicted in Figure 4.38. Self-evaluation and self-awareness had a low response rate, which shows that teachers are unaware of the benefit of self-evaluation and self-awareness when developing a teaching portfolio. Klenowski (2002: 30) indicated that self-evaluation assessed the teacher's performance in terms of strengths and weaknesses in the classroom. Self-evaluation is a benefit for the reflection of a teacher's teaching practice. The pre-service educators in a study conducted by Wray (2007) indicated that a discussion of the teaching portfolio included how the evidence selected for the teaching portfolio could portray the image of the teacher. This task could lead to self-awareness, since the pre-service teachers indicated that they had a positive attitude towards evidence of the teaching portfolio. It allowed them to gain an understanding of knowledge, skills and abilities as a result of reflection (Wray, 2007: 1145). Klenowski (2002: 26) claims that "careful critical self-evaluation is an integral part of the process and involves judging the quality of one's performance and the learning strategies involved". This underscores the benefit of self-reflection and self-awareness as benefits of the teaching portfolio.

The two benefits that elicited the same response rates were "promotes creativity" and "encourages critical thinking". Both of these benefits had a response rate of 51%, as depicted in Figure 4.38 and Table 4.27. The equal response to the promotion of

creativity and encouraging critical thinking indicates that the teachers either regarded these benefits as equally important, or that the same teachers who selected “promotes creativity” also selected “encourages critical thinking”. The lower responses in Figure 4.38 & Table 4.27 were given for “assists in developing teaching and career goals” (35.2%) and “promotes self-expression” (31%). The low response for assisting teachers to develop teaching and career goals and the promotion of self-expression meant that teachers either did not see these as important benefits of the teaching portfolio, or it was not achieved while their teaching portfolios were being developed.

In conclusion to this discussion of the benefits of the teaching portfolio, it can be stated that all the benefits, namely assesses strengths and weaknesses, makes evaluation more meaningful, promotes creativity, encourages critical thinking, reinforces instruction and learning, promotes self-evaluation and self-awareness, assists teachers to develop teaching and career goals and promotes self-expression, are required in the development of the teaching portfolio. This is not affected by the lower response rate to certain benefits such as “promotes self-expression” and “assists teachers to develop teaching and career goals”.

To conclude the study of skills, activities and benefits of the teaching portfolio, the researcher determined the link between these issues by referring to the literature. Assessing strengths and weaknesses had the highest response rate (71%) as a benefit of the teaching portfolio, as shown in Figure 4.38 & Table 4.27. However, it is seen as a prerequisite to self-evaluation, because the teachers’ strengths and weaknesses need to be identified beforehand (Chapman, *et al.*, 2001: 295). Therefore the assessment of strengths and weaknesses was seen as a valuable benefit in the development of the teaching portfolio.

Critical thinking was used as a skill and benefit for the compilation of the teaching portfolio. Critical thinking as a skill had a response rate of 60% in Figure 4.36, while critical thinking as a benefit had a response rate of 51% in Figure 4.38. This indicates that teachers see critical thinking as a skill and not as a benefit of teaching portfolios. The teachers’ preference for critical thinking as a skill is confirmed by the studies of Chapman *et al.* (2001: 295), while Driessen *et al.* (2005a: 1233) established that critical thinking was a benefit in the development of the teaching portfolio. Briede

(2005: 4) confirmed the importance of critical thinking as a skill for teaching portfolio development by indicating that for reflection upon the content of the teaching portfolio to take place, skills of critical thinking and evaluation are required.

The responses to the skill of goal setting (55.9%) as depicted in Figure 4.36 and the activity of professional growth or development (56.6%) in Figure 4.37 were similar. Riggs & Sandlin (2000: 26) indicated that professional development is a bridge to goal setting. This confirms the relatedness of goal setting and professional growth or development.

Self-reflection as a skill obtained the lowest response rate for skills of the teaching portfolio (45.5%) as shown in Table 4.23, indicating that teachers did not see self-reflection as an essential skill for teaching portfolio development. Chapman *et al* (2001: 297) indicated that self-reflection involved not only an analysis of goals and outcomes set by the teachers, but also of whether these goals and outcomes have indeed been achieved, as well as the reasons for its achievement or lack thereof. Therefore self-reflection and goal setting as skills are interlinked. However, there was a difference in the response rate to goal setting (55.9%) and self-reflection (45.5%) as shown in Figure 4.36. It is important that teachers should learn the skill of self-reflection while developing the teaching portfolio. Chapman *et al* (2001: 297) state that as part of the self-reflection process, teachers must reflect upon the types of evidence to be included in the teaching portfolio.

In this study self-reflection as a skill elicited a response rate of 45.5% as depicted in Figure 4.36, while professional development as an activity had a response rate of 56.6% as shown in Figure 4.37. Attinello *et al.* (2006: 142) state that teachers and administrators found the teaching portfolio a useful tool for professional growth, because it encouraged teachers to reflect on their work. Therefore self-reflection and professional development are linked. The low response rate to self-reflection could be ascribed to the fact that teachers possibly do not reflect on their own work. This means that self-reflection is a skill that needs to be developed amongst the teachers.

The activity of beliefs about teaching and learning reflected in one's activities as a teacher in Figure 4.37, and the skill of self-reflection in Figure 4.36, had the same

response rate of 45.5%, and were among the lower response rates. The reason could be that teachers either do very little self-reflection, or they do not know how to reflect on their teaching practice. Consequently they do not document their beliefs about teaching and learning that should reflect in their conduct as a teacher. These beliefs are referred to as the teaching philosophy and form the foundation of a teaching portfolio (Mues & Sorcinelli, 2000: 5). It is clear that teachers of WCED have to learn how to write a teaching philosophy while compiling the teaching portfolio.

The skills, activities and benefits mentioned above are all necessary to compile a teaching portfolio. Opportunities have to be created by the WCED teachers to acquire the skills, activities and benefits that elicited low response rates in this study. This would ensure that teachers create successful and complete teaching portfolios that can be used as a valuable assessment tool.

#### **4.7 CONCLUSION**

Chapter four documented the results of the study that aimed to determine the attitudes, perceptions and factors influencing the implementation of the Consumer Studies teaching portfolio in the WCED. The sub-objectives indicated at the beginning of this chapter were discussed and data was presented in the form of tables and figures. The conclusions and recommendations of this study will be discussed in chapter five.

# CHAPTER 5

## CONCLUSIONS AND RECOMMENDATIONS

### 5.1 INTRODUCTION

The research was undertaken to investigate the attitudes, perceptions and factors that influenced the implementation of a Consumer Studies teaching portfolio. The aim of this chapter is to draw conclusions, provide recommendations and suggest further research based on the findings of this study.

The conclusions will be drawn according to the outline of the questionnaire.

### 5.2 SUMMARY OF FINDINGS

The questionnaire comprised three sections. Section A, covering demographics, will be discussed first, followed by Sections B and C respectively.

#### 5.2.1 Demographics of the teachers

According to the results obtained on the demographics, the majority of Consumer Studies teachers are female, 40 years of age and hold a qualification (Higher Diploma) in Education in Home Economics/Needlework. This qualification indicated that the majority of the educators were college-trained. The focus of teacher training at a college is on the transfer of skills in the various areas of Consumer Studies, namely Food and Nutrition, Clothing and Housing and Furnishings. It can be assumed, therefore, that teachers were trained in the practical skills to teach Consumer Studies. Of all the respondents who had completed the questionnaire, the highest number fell under the jurisdiction of the Southern Cape/Karoo EMDC, the centre located furthest from Cape Town. In terms of demographics it should also be noted that Consumer Studies teachers undertook further studies to enhance their personal and professional development. This was evident from the fact that there were teachers who had completed a master's degree in education, a degree in marketing and a postgraduate diploma in marketing management.

Section B, referring to the various factors that influence the selection of an assessment method, will now be discussed.

### **5.2.2 Selection of assessment methods**

The second part of the questionnaire determined which factors influenced the participating teachers in their selection of an assessment method to be placed in the teaching portfolio. The evidence in the teaching portfolio compiled by the teachers of the WCED contained examples of six assessment methods, namely observation-based assessment, test-based assessment, task-based assessment, self-assessment, peer assessment and group assessment. The seventh assessment method consisted of the learner portfolio that provided evidence of the six assessment methods included in the teaching portfolio.

The following factors influenced the teachers' selection of assessment methods. Each assessment method will be discussed individually.

With regard to observation-based assessment, the factors "plan for instruction", "diagnose student weaknesses", "monitor student progress" and "motivate students" were rated as being of much use for the selection of this assessment method.

The factors "plan for instruction", "diagnose student weaknesses", "monitor student progress", "communicate student achievement" and "assign grades" were seen as of much use for test-based assessment.

"Plan for instruction", "diagnose student weaknesses", "monitor student progress", "motivate students" and "communicate student achievement" were regarded as factors that were of much use for task-based assessment. An interesting observation with regard to task-based assessment was that all the factors selected for this assessment method reached an asymptote, whereby the mean values increased and then levelled off in a linear manner. This result confirmed that all the factors were of much use for task-based assessment.

The results displayed that several factors were relevant for the selection of observation-based, test-based and task-based assessment methods. There was no single factor that emerged as most important in terms of influencing the selection of an assessment method. Each factor selected by the teachers had a role to play in the assessment method. The teachers did not experience any of the factors as being “of no use” for observation-based, test-based and task-based assessment methods. The factors that were not selected for implementing these particular assessment methods, such as “evaluate instruction”, “evaluate instructional material”, “group students” and “encourage self assessment” were not rated as “of no use” for these methods. The factors identified by the teachers as being of much use for observation-based, test-based and task-based assessment methods, are related to lesson planning and the progress and motivation of learners. Therefore, in selecting an assessment method, teachers considered the learners’ needs rather than their own. The focus on the learners is one of the principles of OBE, namely the design-down principle where the point of departure is the learner (Spady, 1994).

All the factors listed in the questionnaire, consisting of “plan for instruction”, “diagnose student weaknesses”, “monitor student progress”, “communicate student achievement”, “motivate students”, “evaluate instruction”, “evaluate instructional materials”, “group students”, “encourage self-assessment” and “assign grades” were seen as of limited use for assessment methods of self-assessment, peer assessment and group assessment. The results indicated that the factor that would have been an obvious choice for self-assessment, namely “encourages self-assessment”, and “group students” for group assessment, were regarded as having limited use for these particular assessment methods. The factor “motivate students” was seen as being of limited use for peer assessment. Even though there were responses indicating “of limited use” for all the factors in terms of self, peer and group assessment, none of the factors were rated “of no use”, which was the most negative response to questions in the questionnaire.

It appears, therefore, that teachers did find the above-mentioned factors of some use for these assessment methods, even though their use was regarded as limited. The results for self-assessment, peer assessment and group assessment indicated that teachers do not often use these assessment methods for lesson planning, learner

progress and motivation. The lack of use of the assessment methods of self-assessment, peer assessment and group assessment could be related to the fact that the majority of the teachers participating in this study were college-trained, where the focus of the training was on the acquisition of practical skills, offering minimal training in how the various assessment methods could be used to assess learners in the classroom. Teachers were therefore unable to experiment with current assessment methods such as self-, peer and group assessment. Teachers need to be trained in the benefits of these assessment methods for the learners, and in ways to apply them successfully in the classroom. Another reason for not using these assessment methods could be the large classes, seeing that these methods require special skills when it comes to teaching large numbers of learners.

It is important that teachers learn how to use all the assessment methods, namely observation-based, test-based, task-based, self-, group and peer assessment methods as set out by the DoE. The second principle of OBE, namely expanded opportunity, requires teachers to use a variety of assessment methods to enhance learners' learning. Assessment practices in OBE need to be varied to develop the knowledge, skills and attitudes that will result in a holistically educated learner who is not only empowered in the area of knowledge. To ensure that the principles of OBE are achieved, a variety of assessment methods should be applied to test competence at the various levels. Therefore, all the above-mentioned assessment methods are in synchronisation with the principles of OBE that would provide various learning opportunities for learners and develop their knowledge, skills and attitudes.

The factors that influenced the learner portfolio as an assessment tool included those selected for observation-based, test-based and task-based assessment, namely “plan for instruction”, “diagnose student weaknesses”, “monitor student progress”, “communicate student achievement”, “motivate students” and “assign grades”. These factors also elicited the response “of much use” for learner portfolio assessment. The results indicated that the factors influencing the selection of the learner portfolio correlated with the factors selected for observation-based, test-based and task-based assessment methods. The reason for the correlation is that the observation-based, test-based and task-based methods were included as evidence of the various types of assessment methods applied during the year. It is also evident that teachers were using

different forms of assessment methods to assess a student, which proves that the OBE principle of expanded opportunity was implemented.

It can be concluded, firstly, that various factors influenced the selection of the assessment methods represented in the teaching portfolio. The results showed that there was no one particular factor for selecting one assessment method. The factors that influenced the selection were spread across the various assessment methods. Secondly, neither of the factors was rated as “of no use” in terms of influencing the selection of assessment methods. This indicated that none of the factors was “of no use” for selecting any of the assessment methods. Therefore teachers did reflect on the factors that led them to select an assessment method for the teaching portfolio. Teachers were supplementing and/or substituting the traditional tests and examinations aimed at developing learners’ knowledge only, by assessment methods that would develop knowledge, skills and attitudes. Moreover, teachers were moving away from the traditional education assessment methods to the transformational approach of OBE.

This indicates that teachers considered the learners’ needs above their own. They were concerned about the learners’ achievement of certain competencies in Consumer Studies that would be attained through outcomes, instead of relying on whether the syllabus had been covered as in the traditional education system. Teachers used assessment methods that would enhance learners’ abilities, which in turn would lead to the attainment of outcomes and the successful completion of a particular grade. Through the transformational approach in which a variety of assessment methods were used, learners were assessed according to the achievement of outcomes and not according to the marks obtained for an assessment task. By employing various assessment methods teachers were able to assess learners’ ability to apply the acquired knowledge, skills and expertise to real-life contexts.

In turn, the application of various assessment methods provided teachers with information about how the learners understand new concepts, besides monitoring their competencies and progress to exit a particular learning programme. Therefore the assistance of observation-based, test-based, task-based, self-, group and peer assessment methods would provide the teacher with a holistic view of the learner.

### **5.2.3 Attitudes towards the assessment process**

The third part of the questionnaire aimed to determine the attitude of teachers towards the assessment process. The assessment process is captured and culminates in a teaching portfolio that includes all the assessment items the teacher has prepared for the learners. It can be concluded that the participating Consumer Studies teachers had a positive attitude toward the development of the teaching portfolio, as they responded positively to the nine bipolar adjectives.

For this part of the questionnaire teachers were required to rate their attitude towards the assessment process according to a scale where 1 represented “extremely negative” and 6 represented “extremely positive” for the nine bipolar adjectives. The nine bipolar adjectives that measured the teachers’ attitude towards the assessment process were “valuable”, “successful”, “efficient”, “important”, “good”, “fair”, “reputable”, “flexible” and “relaxing”.

The responses to all of these adjectives fell in the positive range of the scale, except for the adjective “important” that elicited a response for “very positive”. The importance of the assessment process is linked to Spady’s (1994) principle of expanded opportunity that requires teachers to utilise a variety of methods to assess learners’ knowledge, skills and abilities. This attitude displayed by the teachers towards the assessment process indicates that they realised the importance of the variety of methods being placed in the teaching portfolio.

It can be inferred that the teachers had a positive attitude toward the assessment process, because they indicated that the teaching portfolio was “valuable”, “successful”, “efficient”, “good”, “fair”, “reputable”, “flexible” and “relaxing”. In the literature Robinson & Bennett (n.d.); Ford & Ohlhausen (1991); Slater (1997) and Wray (2007) confirmed teachers’ positive responses towards the development and implementation of the teaching portfolio.

#### **5.2.4 Perceptions of constraints towards the assessment process**

In the third part of the questionnaire that addressed the perceptions of the constraints in the assessment process, statements were posed in a continuum of positive and negative in terms of “strongly agree” to “strongly disagree”. The constraints “quality published assessment materials are hard to find”, “educator courses were of little help in preparing me to assess learner learning” and “I do not have information on published assessment materials” were posed in a negative way, which means that the respondents also answered it in negative terms.

One of the statements that were posed negatively elicited the negative response of “quality published assessment materials are hard to find”. Teachers agreed that it was difficult to obtain quality published assessment materials for the assessment process. The reason could be that the assessment materials available to them are either not suited to the needs of the learners, or offer insufficient ideas for various assessment methods.

The two remaining negative statements of “educator courses were of little help in preparing me to assess learner learning” and “I do not have information on published assessment materials” elicited a response of “disagree”. This could be interpreted as that teachers did not agree with the statements: “educator courses offered minimal assistance with assessment of learners”, and “teachers had no information about published assessment materials”. The remaining statements that were posed in a positive manner elicited a positive response of “agree”. The statement, “additional planning time would allow teachers to use assessment methods more effectively” had the highest response for “strongly agree”. This indicated that teachers preferred extra time that would allow them to use the assessment methods appearing in the teaching portfolio more effectively in the classroom. The perception of time consumption while developing a teaching portfolio was supported by Attinello *et al.* (2006); Tigelaar *et al.* (2006); Apple & Shimo (2007). Teachers employed by the DoE have many administrative duties which impact on their assessment practices in the classroom.

The aspects that were linked to assessment in the statements were: type of assessment methods used in the classroom, time and assistance to plan assessment methods, availability of equipment to mark tests, quality published materials and assistance of teacher courses and in-service activities with assessment. Therefore the teachers did not perceive any of these aspects as constraints or barriers in the assessment process and were therefore positive about the teaching portfolio.

### **5.2.5 Factors related to the development of the teaching portfolio**

The last part of the questionnaire, Section C, was used to determine which factors affected the implementation of the teaching portfolio. This was divided into three sections, namely skills required to compile a teaching portfolio, activities that are reconsidered as a result of the teaching portfolio, and benefits of the teaching portfolio:

#### **5.2.5.1 Skills required to compile a teaching portfolio**

In this section of the questionnaire the various skills required to compile a teaching portfolio were listed. Teachers had to identify the skills by ticking the ones that they thought were required to compile a teaching portfolio.

Presentation skills and critical thinking had the highest response rates for skills required to compile a portfolio of this kind. The skills of journal writing and self-reflection had the lowest response rates. In the current literature these skills are described as important for teaching portfolio compilation. This result indicated that teachers were unaware of the importance of journal writing and self-reflection when compiling a teaching portfolio. The low response to journal writing and self-reflection could also be related to a lack of knowledge about these skills offered during teacher training, and a lack of skills to look critically at their own teaching practice. The training of teachers is focused upon the knowledge and skills to teach Consumer Studies, and colleges probably did not focus on the development of skills to empower reflective practitioners.

Journal writing would encourage teachers to reflect upon their teaching practice. This would ease the task of self-reflection when considering the evidence placed in the

teaching portfolio. The other skills include self-assessment and goal setting. Seldin *et al.* (1995); Lyons (1999); Riggs & Sandlin (2000); Chapman *et al.* (2001); Painter (2001); Campbell & Brummet (2002); Klenowski (2002); Wyatt & Looper (2004) indicated the importance of all the skills, namely journal writing, goal setting, self-assessment, self-reflection, presentation skills and critical thinking listed in the questionnaire for portfolio development. These skills are important to the development and implementation of the teaching portfolio because firstly, it allows teachers to foster a critical attitude towards his or her teaching practice, which in turn would improve teaching and assessment in the classroom. Secondly, these skills would provide insight into a teacher's strengths and weaknesses and would determine if personal and professional accomplishments had been achieved. Therefore teachers should be equipped with the necessary skills before embarking on a teaching portfolio.

#### **5.2.5.2 *Reconsideration of activities stimulated by the teaching portfolio***

In this section of the questionnaire, the various activities that required reconsideration and that were stimulated by the teaching portfolio were listed. Teachers had to identify the activities by ticking the ones that were reconsidered when compiling a teaching portfolio.

Teachers were asked to indicate if the teaching portfolio stimulated their thinking for certain activities which included "teaching outcomes", "teaching methods", "assessment methods", "professional growth" and "beliefs about teaching and learning being reflected in actions as a teacher". The highest response rates were elicited by "assessment methods" and "personal teaching outcomes". The high response to the activity of "assessment methods" by the teachers could be linked to their positive attitude to the assessment process that was determined in this study. The assessment process entails the use of various assessment methods that are placed in the teaching portfolio. Therefore the teachers' response rate to assessment methods was higher than to other activities listed in the questionnaire. Teachers are required to think about the assessment methods that will be used to assess learners before placing them in the teaching portfolio as evidence for moderation purposes.

The DoE's assessment policy requires teachers to use a variety of methods for assessing the outcomes of a particular learning area, which in this study is that of

Consumer Studies. In Consumer Studies learners are formatively assessed and the main aspect of formative assessment is that teachers should use various assessment methods to assess learners' progress. The high response to "assessment methods" is confirmed by the DoE's assessment policy that requires teachers to use a variety of assessment methods to assess learners.

"Beliefs about teaching and learning are reflected in actions as a teacher" as an activity elicited the lowest teacher response. In the literature by Mues & Sorcinelli (2000) and Darling (2001) this activity is referred to as the teaching philosophy. It is important that this item should be placed in the teaching portfolio, because it describes the teacher's beliefs about his or her teaching practice, which will in turn influence the teaching practice of the teacher. These beliefs include reflection upon how teachers can assist learners to learn, goals for learners and the implementation of effective teaching and learning strategies. This low response could be attributed to the fact that teachers were not required to include their teaching philosophy in the teaching portfolio, or that teachers were not trained in writing a teaching philosophy, as this is not a prerequisite for compiling a teaching portfolio for the WCED.

The WCED stated that the teaching portfolio contained all instructions, assessment criteria and rubrics pertaining to all CASS tasks prepared for learners (Western Cape Education Department, 2001). Therefore teachers in this study are not required to write a teaching philosophy when developing a teaching portfolio. Administrators, subject advisors and teachers of the WCED should be made aware of the importance of a teaching philosophy appearing in the teaching portfolio.

The activities of "personal teaching outcomes", "teaching methods", and "professional growth" are reconsidered in the process of developing the teaching portfolio. The response rate to "personal teaching outcomes" was closely related to "assessment methods". The association between these two items can be explained by the recommendation of Seldin (1993); Mues & Sorcinelli (2000); Seldin (2000) for both activities to be placed in the teaching portfolio. "Teaching methods" and "professional development" elicited the same percentage response rate. Literature by Campbell & Brummet (2002); Riggs & Sandlin (2000); Chapman *et al.* (2001) has

shown that while “professional development” is an important aspect of compiling the teaching portfolio, “teaching methods” should also be included.

Outcomes can be used as a guideline for the type of teaching methods and assessment methods to be used by teachers. In OBE outcomes are used as a set of criteria against which learners are assessed, and in turn these criteria serve to guide teachers in their selection of assessment methods. The use of “personal teaching outcomes” by teachers in various learning programmes provides transparency of the content, teaching methods and assessment methods to teachers and learners. The compilation of the teaching portfolio reflects the professional development of the teacher, as it documents all activities that teachers undertake to improve his or her career. One of the activities that would be evident of professional development, is reference to the type of teaching methods used by the teachers in the classroom.

The use of various teaching methods should be evident in the teaching portfolio. This would illustrate if the teacher had experimented with innovative teaching methods in the classroom, and whether any training in new teaching methods had taken place during a teacher’s career. As a result, all the activities that were reconsidered in compiling the teaching portfolio are important, even though certain activities had a higher response rate than others. None of these activities should be omitted from the teaching portfolio.

### ***5.2.5.3 Benefits of the teaching portfolio***

In this section of the questionnaire, the various benefits of the teaching portfolio were listed. Teachers had to identify the benefits by ticking the ones that they thought were beneficial when compiling a teaching portfolio.

The benefits of the teaching portfolio listed in the questionnaire included “assesses strengths and weaknesses”, “reinforces instruction and learning”, “makes evaluation more meaningful”, “assists educators develop teaching and career goals”, “promotes self-evaluation and self-awareness”, “promotes creativity”, “promotes self-expression” and “encourages critical thinking”.

The data analysis and results revealed that assessing strengths and weaknesses had the highest response rate for the benefits of the teaching portfolio. This result indicates that the teachers utilised the teaching portfolio to assess their strengths and weaknesses, but omitted the self-evaluation and self-awareness exercises. Literature by Riggs & Sandlin (2000) and Klenowski (2002) has shown that the “assessment of strengths and weaknesses” has to precede “self-evaluation and self-awareness”. Studies by Chapman *et al.* (2001) and Xu (2003) have also indicated assessment of strengths and weaknesses as a perceived benefit.

“Self-evaluation and self-awareness” had a low response rate, which shows that teachers are not aware of the importance of self-evaluation and self-awareness. This lack of “self-evaluation and self-awareness” by teachers could be related to the fact that they were college-trained, and had therefore not acquired the skills that would enable them to reflect upon the reasons for their weaknesses and strengths in their teaching practice.

The benefit of “making evaluation more meaningful” had the second highest response rate. “Making evaluation more meaningful” was linked to summative assessment. The reason for this response rate by the teachers of WCED is that the teaching portfolio is prepared for moderation purposes at the end of the school year and evaluated by the curriculum advisor. This implies that the teaching portfolio for Consumer Studies, which is summatively assessed at the end of the year, makes evaluation more meaningful for teachers, because they are able to assess the strengths and weaknesses that occurred in their teaching practice throughout the school year. The curriculum advisor is in a position to advise teachers about how their teaching practice could be improved. In the OBE system the curriculum advisor fulfils a supportive role and not a “policing” role, as was the case in the traditional education system.

The benefits of “encourages of critical thinking” and “promotes creativity” had the same response rate, which was the third highest of all the benefits of the teaching portfolio. “Critical thinking” is seen as a benefit for teaching portfolios, and so is creativity, which forms an integral part of teaching portfolio presentation and development. Creativity is linked to the benefit of promoting self-expression, because self-expression should allow the teacher to demonstrate originality in the teaching

portfolio. Promotion of self-expression received a low response rate, the reason possibly being that the participating teachers were not able to express their creativity and originality through the teaching portfolio.

The teaching portfolio as a benefit in the “assistance of educators to develop teaching and career goals” had a low response rate, which could be the result of teachers not consciously thinking about their teaching and career goals. This could be linked to the non-inclusion of a teaching philosophy in the teaching portfolio developed by WCED Consumer Studies teachers.

Through the data analysis and results the following linkages between the skills, activities and benefits of the teaching portfolio were found.

Firstly, “critical thinking” is linked as a skill and an activity, but enjoyed preference as a benefit by the teachers. This means that teachers did not regard “critical thinking” as a skill.

Secondly, “goal setting” as a benefit is linked to “professional growth” as an activity, and to “self reflection” as a skill. Literature by Riggs & Sandlin (2000); Chapman *et al.* (2001); Brummet & Campbell (2002) has indicated that “professional development” acts a bridge to “goal setting”, and that through “self-reflection” a teacher can analyse the achievement or lack of achievement of goals.

Thirdly, “self-reflection” as a skill is linked to the activities of “professional growth” and the “beliefs about teaching and learning that is reflected in the actions as a teacher”. It has been stated that the teaching portfolio promotes “professional growth”, because it encourages “self-reflection”. The latter activity, which was referred to as the teaching philosophy, had the same response rate as “self-reflection”, which had low ratings. This result indicated that teachers did not see the importance of “self-reflection” as a skill and the teaching philosophy as an activity in the development of the teaching portfolio.

The following factors were selected by the teachers as the ones which were required to develop a teaching portfolio, as they elicited higher response rates than others:

“critical thinking”, “presentation skills”, goal setting”, “assesses weaknesses and strengths”, makes evaluation more meaningful”, “promotes creativity”, “critical thinking”, “assessment methods”, “personal teaching outcomes, “professional growth” and “teaching methods”. In conclusion, however, all the factors were selected by some of the teachers. It may be concluded that skills, activities and benefits that constituted the factors relating to the teaching portfolio, are all interlinked and necessary. Therefore the teacher has to possess and demonstrate all the factors that are required to develop a successful teaching portfolio.

### **5.3 RECOMMENDATIONS**

After considering the above conclusions, the following recommendations are suggested to assist teachers in compiling a successful teaching portfolio. These recommendations can also be considered by the WCED when planning assessment policy and guidelines.

5.3.1 WCED should plan training programmes or run workshops that would equip teachers with the skills, activities and benefits that had a low response rate. A selection of factors are identified for further training:

1. The development of a teaching philosophy from a self-reflective position develops a road map of teaching activities.
2. The skills of self-assessment, journal writing and writing a reflective statement could equip a reflective educator to engage in the assessment process more effectively.

5.3.2 The WCED can structure the Consumer Studies teaching portfolio and teachers can collect evidence according to the different roles fulfilled by a teacher, for example that of a teacher, researcher, mentor, assessor and reflective thinker. These roles could provide teachers with a guideline that would make the expectations of the teaching portfolio transparent.

5.3.3 A transparent set of assessment criteria should be developed to clearly outline the quality and standard expected from teachers when submitting a teaching portfolio for moderation purposes.

- 5.3.4 South African textbooks about the various aspects of the teaching portfolio should be published and made available to teachers. Aspects of the teaching portfolio that can be discussed in the textbooks are the definition of a teaching portfolio, content to be included in the teaching portfolio, organisation of a teaching portfolio and assessment of a teaching portfolio. It could also suggest ways to start developing a teaching portfolio, especially for first-time teachers.
- 5.3.5 Coaching teachers in the development of the teaching portfolio should be explored. This means that teachers who are experienced in developing teaching portfolios can assist and guide inexperienced teachers. Clear guidance needs to be given around the purpose and function of the teaching portfolio in relation to teacher development.
- 5.3.6 Teachers should be trained as to how self-assessment, peer assessment and group assessment can be used constructively to evaluate learners.
- 5.3.7 Education faculties at higher education institutions could allow student teachers to compile a teaching portfolio in the course of their teaching internship. This would familiarise the student teachers with the concept of the teaching portfolio.
- 5.3.8 Education faculties at higher education institutions can provide courses about teaching portfolio development to in-service teachers.

## **5.4 FURTHER RESEARCH**

The following further research may flow from the recommendations of this study.

- 5.4.1 An investigation into the effectiveness of the teaching portfolio as an assessment tool.
- 5.4.2 Research into the professional development of teachers should be undertaken to determine how the teaching portfolio can play a role in this process.

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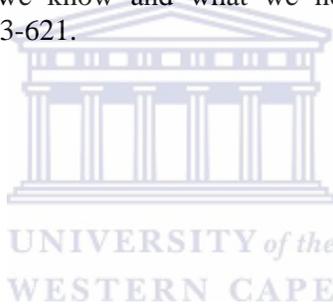
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## APPENDIX

### APPENDIX 1: RESEARCH INSTRUMENT



#### Research Statement:

To investigate the attitudes, perceptions and factors affecting the implementation of the Consumer Studies teaching portfolio in the Western Cape Education Department.

#### SECTION A: DEMOGRAPHICS

1. Indicate if you are male (M) or female (F):

M	F
---	---

2. Indicate your age:

--	--

3. Indicate the EMDC your school falls under:



Breede River/Overberg	
Central East	
Helderberg	
North	
South	
South Cape/Karoo	
West Coast/Winelands	

4. Crude composition of learners at your school:

Blacks	90%		70%		20%		10%	
Coloureds	90%		70%		20%		10%	
Indians	90%		70%		20%		10%	
Whites	90%		70%		20%		10%	

5. Indicate your type of qualification by placing a (x) in the correct block.  
More than one block can be ticked.

BSc degree	
BSc degree with teaching qualification	
BA (Human Ecology) Education	
BA (Human Ecology)	
BA (Home Economics)	
BA (Consumer Science)	
HDE with Home Economics/Needlework	
Other	

## SECTION B

### Part 1: Various factors influence the selection of an assessment method

Rate the following factors in relation to the assessment method using the following scale.

1 = of no use; 2 = of limited use; 3 = of much use; 4 = of considerable use

Factors influencing selection of assessment method	Observation-based	Test-based	Task-based	Self-assessment	Peer assessment	Group assessment	Learner portfolios
Plan for instruction							
Diagnose student weaknesses							
Monitor student progress							
Communicate student achievement							
Motivate students							
Evaluate instruction							
Evaluate instructional materials							
Group students							
Encourage self-assessment							
Assign grades							
Other factors							
*							
*							
*							
*							

**Part 2: Attitudes toward assessment**

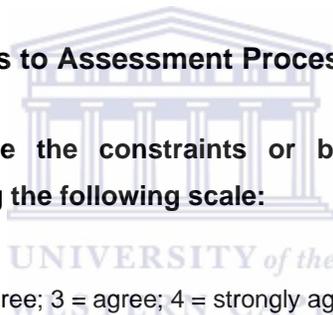
You are required to rate your attitude toward the assessment process using the following scale:

1 = extremely negative; 2 = very negative; 3 = negative; 4 = positive; 5 = very positive; 6 = extremely positive

Worthless							Valuable
Unsuccessful							Successful
Inefficient							Efficient
Unimportant							Important
Bad							Good
Unfair							Fair
Disreputable							Reputable
Rigid							Flexible
Tense							Relaxed

**Part 3: Constraints to Assessment Process**

You are required to rate the constraints or barriers which impact the assessment process using the following scale:



1 = strongly disagree; 2 = disagree; 3 = agree; 4 = strongly agree

Item	Rating
I decide what assessment methods to use in the subjects I teach	
Additional planning time would allow me to use the assessment methods more effectively	
Equipment is available in my school for use in scoring tests	
Quality published assessment materials are hard to find	
Funds are available for purchasing published assessment materials	
Educator courses were of little help in preparing me to assess learner learning	
In-service activities have helped develop my assessment skills	
I have assistance in preparing student assessment activities	
I do not have information on published assessment materials	
<b>Other constraints:</b>	

## SECTION C

Answer the following questions relating to teaching portfolios:

1. Identify the skills you required to compile your teaching portfolio. You may tick more than one answer.

Journal writing	
Goal setting	
Self-assessment	
Self-reflection	
Presentation skills	
Critical thinking	
<b>Other:</b>	
*	
*	
*	
*	

2. Does the teaching portfolio stimulate you to reconsider the following activities? You may tick more than one answer.

Personal teaching outcomes	
Teaching methods	
Assessment methods	
Professional growth	
Your beliefs about teaching and learning is reflected in your actions as a teacher	
<b>Other:</b>	
*	
*	
*	
*	

3. Does the teaching portfolio provide the following benefits? You may tick more than one answer.

Assesses strengths and weaknesses	
Reinforces instruction and learning	
Makes evaluation more meaningful	
Assists teachers develop teaching and career goals	
Promotes self-evaluation and self-awareness	
Promotes creativity	
Promotes self-expression	
Encourages critical thinking	
<b>Other:</b>	
*	
*	
*	
*	

**APPENDIX 2: LETTER TO WESTEN CAPE EDUCATION DEPARTMENT**



**UNIVERSITY OF THE WESTERN CAPE**

Private Bag X17 BELLVILLE 7535 South Africa Telegraph: UNIBELL  
Telephone: 27 021 959-2760 Fax: 27 021 959-3686

*HUMAN ECOLOGY & DIETETICS*

Dr R.S. Cornelissen  
Head: Education  
Western Cape Education Department  
Grand Central Towers  
Lower Parliament Street  
Private Bag X9114  
Cape Town  
8000



UNIVERSITY of the  
WESTERN CAPE

Dear Dr Cornelissen

I am currently a registered Human Ecology Master's student in the Faculty of Community and Health Sciences at the University of the Western Cape.

I am embarking on research to investigate the perceptions and attitudes of Consumer Studies teachers and the factors affecting the implementation of the Consumer Studies teaching portfolio in the Educational Management Development Centres of the Western Cape Education Department.

The Faculty of Community and Health Sciences Higher Degrees committee has approved my research proposal on 8 April 2005.

I am requesting permission to do the research at the Consumer Studies cluster meeting of the seven EMDCs in June 2005.

Attached please find my proposal.

Yours sincerely

---

J.J. Cornelissen  
Tel: 959 – 2760  
e-mail: [jjcornelissen@uwc.ac.za](mailto:jjcornelissen@uwc.ac.za)  
(Supervisor)

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L.O. Cornelissen  
Tel: 959 – 2760  
e-mail: [lcornelissen@uwc.ac.za](mailto:lcornelissen@uwc.ac.za)  
(Student)

**APPENDIX 3: CONSENT LETTER FROM WESTERN CAPE  
EDUCATION DEPARTMENT TO CONDUCT  
RESEARCH**



Navrae  
Enquiries **Dr RS Cornelissen**  
IMibuzo  
Telefoon  
Telephone **(021) 467-2286**  
IFoni  
Faks  
Fax **(021) 425-7445**  
IFeksi  
Verwysing  
Reference **20050429-0042**  
ISalathiso



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**Wes-Kaap Onderwysdepartement**

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**Western Cape Education Department**

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**ISebe leMfundo leNtshona Koloni**

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Miss Liezl Cornelissen  
101 18<sup>th</sup> Avenue  
KENSINGTON  
7405

**Dear Miss L. Cornelissen**

**RESEARCH PROPOSAL: AN INVESTIGATION INTO THE PERCEPTIONS AND ATTITUDES OF HOME ECONOMICS EDUCATORS AND THE FACTORS AFFECTING THE IMPLEMENTATION OF THE CONSUMER STUDIES TEACHING PORTFOLIO IN THE EMDCS OF THE WCED.**

Your application to conduct the above-mentioned research in schools in the Western Cape has been approved subject to the following conditions:

1. Principals, educators and learners are under no obligation to assist you in your investigation.
2. Principals, educators, learners and schools should not be identifiable in any way from the results of the investigation.
3. You make all the arrangements concerning your investigation.
4. Educators' programmes are not to be interrupted.
5. The Study is to be conducted from **1<sup>st</sup> June 2005 to 23<sup>rd</sup> September 2005.**
6. No research can be conducted during the fourth term as schools are preparing and finalizing syllabi for examinations (October to December 2005).
7. Should you wish to extend the period of your survey, please contact Dr R. Cornelissen at the contact numbers above quoting the reference number.
8. A photocopy of this letter is submitted to the Principal where the intended research is to be conducted.
9. Your research will be limited to the list of schools as submitted to the Western Cape Education Department.
10. A brief summary of the content, findings and recommendations is provided to the Director: Education Research.
11. The Department receives a copy of the completed report/dissertation/thesis addressed to:  
**The Director: Education Research  
Western Cape Education Department  
Private Bag X9114  
CAPE TOWN  
8000**

We wish you success in your research.

Kind regards.

Signed: Ronald S. Cornelissen  
for: **HEAD: EDUCATION**  
**DATE: 29<sup>th</sup> April 2005**

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MELD ASSEBLIEF VERWYSINGSNOMMERS IN ALLE KORRESPONDENSIE / PLEASE QUOTE REFERENCE NUMBERS IN ALL CORRESPONDENCE / NCEDA  
UBHALE IINOMBOLO ZESALATHISO KUYO YONKE IMBALELWANO

GRAND CENTRAL TOWERS, LAER-PARLEMENTSTRAAT, PRIVAATSAK X9114, KAAPSTAD 8000  
GRAND CENTRAL TOWERS, LOWER PARLIAMENT STREET, PRIVATE BAG X9114, CAPE TOWN 8000

WEB: <http://wced.wcape.gov.za>

**INBELSENTRUM / CALL CENTRE**

INDIENSNEMING- EN SALARISAVRAE/EMPLOYMENT AND SALARY QUERIES ☎0861 92 33 22  
VEILIGE SKOLE/SAFE SCHOOLS ☎0800 45 46 47

**APPENDIX 4: LETTER TO CHIEF CURRICULUM ADVISOR:  
CONSUMER STUDIES**



**UNIVERSITY OF THE WESTERN CAPE**

Private Bag X17 BELLVILLE 7535 South Africa Telegraph:  
UNIBELL  
Telephone: 27 021 959-2760 Fax: 27 021 959-3686

*HUMAN ECOLOGY & DIETETICS*

---

Chief Curriculum Advisor: Consumer Studies  
Western Cape Education Department  
Grand Central Towers  
Lower Parliament Street  
Private Bag X9114  
Cape Town  
8000

Dear Ms B. Soquele

I am currently a registered Human Ecology Master's student in the Faculty of Community and Health Sciences at the University of the Western Cape.

I am embarking on research to investigate the perceptions and attitudes of Consumer Studies teachers and the factors affecting the implementation of the Consumer Studies teaching portfolio in the Educational Management Development Centres of the Western Cape Education Department.

The Faculty of Community and Health Sciences Higher degrees committee has approved my research proposal on 8 April 2005.

I hereby request permission to meet the Consumer Studies subject advisors at a time convenient to them. I could meet them at the training sessions in June to discuss the project.

Hoping this meets with your approval.

Yours sincerely

---

J.J. Cornelissen  
Tel: 959 – 2760  
e-mail: [jjcornelissen@uwc.ac.za](mailto:jjcornelissen@uwc.ac.za)  
(Supervisor)

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L.O. Cornelissen  
Tel: 959 – 2760  
e-mail: [lcornelissen@uwc.ac.za](mailto:lcornelissen@uwc.ac.za)  
(Student)

## APPENDIX 5: COVERING LETTER WITH QUESTIONNAIRE TO TEACHERS



### UNIVERSITY OF THE WESTERN CAPE

Private Bag X17 BELLVILLE 7535 South Africa Telegraph:  
UNIBELL  
Telephone: 27 021 959-2760 Fax: 27 021 959-3686

### *HUMAN ECOLOGY & DIETETICS*

---

Dear Educators

I am currently enrolled for a Master's degree in Human Ecology at the University of the Western Cape. My topic is to *investigate the attitudes, perceptions and factors affecting the implementation of the Consumer Studies teaching portfolio in the Western Cape Education Department*. In completion for my Master's thesis I have to obtain data and therefore require your assistance for this part of my study.

Throughout this study you will be protected from being identified since names will be omitted in all research instruments and confidentiality is ensured. Feedback will be given to you at the end of the study.

Would it be possible for me to have 20 minutes of your precious time to complete the attached questionnaire?

Your input would be much appreciated.

THANK YOU VERY MUCH FOR YOUR TIME.

---

Ms L Cornelissen  
Masters student: Human Ecology

---

Professor J.J. Cornelissen  
Supervisor: Human Ecology