

**A CONCEPTUAL EXPLORATION OF THE TEACHING AND  
ASSESSMENT OF VALUES WITHIN THE SOUTH AFRICAN  
OUTCOMES-BASED CURRICULUM**

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**A thesis submitted in fulfilment of the requirements for the degree of  
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# **A CONCEPTUAL EXPLORATION OF THE TEACHING AND ASSESSMENT OF VALUES WITHIN THE SOUTH AFRICAN OUTCOMES-BASED CURRICULUM**

## **KEYWORDS**

Values

Values education

Values knowledge

Policies

Integration

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Outcomes based education

Competence

Assessment

Measurement



## **ABSTRACT**

### **A conceptual exploration of the teaching and assessment of values within the South African Outcomes-based Curriculum**

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Both international and local authors argue strongly that state education systems have an important role to play in the development and nurturing of positive values and attitudes in learners. In some instances, as is the case in South Africa, the education system may even prescribe the values that ought to be taught in the institutions of learning. While I agree that education institutions have a responsibility to teach positive values to learners, it is my contention that it is unlikely that educators will be able to fulfil this role in any meaningful way, without an informed understanding of how to reconcile the tensions between personal and common values, the nature of values knowledge and the complexities and challenges that surround the teaching and assessment of values.

This study begins to explore some of these complexities by addressing the historical events, education initiatives and policy decisions that have informed and shaped values education policies in South Africa. I conclude that while the inclusion of values in the curriculum is a commendable education initiative to root democratic values in society, it must be acknowledged that values education inevitably, has a political role to fulfil.

The teaching of values knowledge cannot be limited to behaviourist approaches. Learners deserve an education that offers opportunities to them to develop into responsible, caring and morally just citizens. A central aim of values education should thus be to provide learners with opportunities and tools to construct meaning around moral concepts and positive values. I strongly believe that it is unlikely that this will occur if educators are not appropriately capacitated to provide such opportunities to their learners.

I explore the concepts of assessment and measurement based on the distinctions of Mouton (1996) and Kaplan (1964) and conclude that the assessment of values (the collecting of evidence of learning) needs to be distinguished from the notion of measurement or quantification. Based on Ryle's (1971) framework I argue that while particular conceptions of the assessment of values knowledge may be accommodated within the framework of Outcomes-based education, the notion of the measurement of values knowledge is extremely problematic and therefore it is not considered as a priority for education in other countries. My contention is that the epistemological and pedagogical implications and challenges embedded in values education, within the framework of Outcomes-based education, were perhaps not fully explored and considered during the curriculum development process and that values education is more complex than was initially thought.

**June 2009**



## DECLARATION

I declare that *A conceptual exploration of the teaching and assessment of values within the South African outcomes-based curriculum* is my own work, that it has not been submitted before for any degree or examination in any other university, and that all the sources I have used or quoted have been indicated and acknowledged as complete references.

Inez Denise Solomons

Signed: ..... June 2009



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# **A CONCEPTUAL EXPLORATION OF THE TEACHING AND ASSESSMENT OF VALUES WITHIN THE SOUTH AFRICAN OUTCOMES-BASED CURRICULUM**

## **CHAPTER 1**

### **1.1 INTRODUCTION TO THE STUDY**

In this chapter I provide the motivation for the study and explain its aims. I outline its general and specific concerns about values education and explain the theoretical and empirical questions that I explore. This is followed by a brief outline of the theoretical frameworks and research approaches that I have drawn upon. I explain briefly the significance of this study, and finally, give an overview of what each chapter contains and provide interpretations of some key terms.

### **1.2 MOTIVATION FOR THE STUDY**

Morrow (1989: 174) in the late eighties identified a lack of moral discourse as one reason for the moral malaise that had become endemic to society in the past and maintained that:

... because of its use for betrayal moral discourse has become degenerate in our society. The legacy of a morally degenerate society is that moral discourse ceases to have credibility in public debate and it fails to gain a purchase on the decisions which people make.

Since then the political context and social landscape of South African society have changed in fundamental ways, but it appears that changes in the socio-political context have not provided the desired solutions to the moral challenges that society encountered in the past.

In the recent past increasing societal concern and outrage about the perceived moral degeneration of civil society generally and particularly in schools has revived the moral discourse among scholars in South Africa. Kallaway (Mail & Guardian, 18 November 2007: 8) for instance, under the heading “The profound crisis of teaching” remarks

The majority of public schools in our country can be regarded as sites of moral panic that highlight criminality, vandalism, bullying and violence, as well as “drop out” and academic failure.

He blames this state of affairs on the government’s unstructured and unplanned progressive education. Fataar (2002), Jansen and Christie (1999), and Jonathan (2001) have also offered explanations for the perceived moral decline in South African schools and society which generally include amongst others, the history of apartheid, the collapse of a culture of teaching and learning, the development of a culture of corruption and serious misconceptions about democracy and human rights. As a result South African society, not unlike many other societies in the world, presently, as it did in the past, continues to face complex moral challenges.

In South Africa values education policies have been included in the National Curriculum and it is anticipated that education will help “to heal the divisions of the past and establish a society based on democratic values, social justice and fundamental human rights” (Constitution of the Republic of South Africa, Act 108 of 1996). This kind of healing refers to forgiveness, empathy, caring, respect, tolerance and compassion. In short, it refers to transforming the consciousness and mindsets of people. These were the expectations that values education were required to meet.

The media constantly reports on human rights abuses and actions informed by prejudice, disrespect and racial intolerance. This kind of news confirms that there is indeed a problem of decay in morals of society. Incidences of undisciplined behaviour, racial intolerance, crime, violence, gangsterism and

drug abuse, especially the notorious drug “TIK” on the Cape Flats, continue to plague schools and regularly make headlines in the media. This has resulted in a fast growing perception among civil society that education is not producing the expected results. In this article Kallaway claims that educators are expected to bear the brunt for the non-delivery of a quality mass education system that was promised to all.

It would of course be unrealistic to expect that education can on its own deliver the desired moral changes in society as values education is not only about what happens at schools. This responsibility is a shared family, educational, political, economic and social responsibility. Vygotsky (1978) explains that a child’s potential for any form of learning is revealed and often realized in interactions with more knowledgeable others; educators, peers, siblings, parents and other members of his society. Rorty (1990) and Peters (1966) as well as various other scholars, share the view that schools have some responsibility for the moral development of learners. Educators in South Africa accept this responsibility to teach values, but, unlike the situation in many other countries, the assessment of values is also prescribed by the Outcomes-based (OBE) curriculum of South Africa (A Teacher’s Guide for the Development of Learning Programmes Policy Guidelines Life Orientation DoE, 2003).

The Manifesto on Values, Education and Democracy (2001) was an initiative that paved the way for the explicit inclusion of common values in the national curriculum. But given the history of apartheid and the competing values philosophies of the Liberation Movements, several critics at the Saamtrek: Values, Education and Democracy in the 21<sup>st</sup> Century (2001) remained sceptical about the potential of values education to effect social transformation and so the inclusion of common social values in the curriculum did not receive overwhelming support. Discussions about the inclusion of values in the curriculum in South Africa have therefore been vigorous and highly contested (Jansen & Christie, 1999). The literature

indicates that this is also the situation internationally as not all countries are in favour of the teaching and assessment of values in schools. For, while the intentions of these policies are laudable, many critics believed that the prescription and inclusion of common values in the national curriculum of South Africa would present particular challenges to educators for a number of diverse reasons (Saamtrek: Values, Education and Democracy in the 21<sup>st</sup> Century, 2001). These reasons can be summarised as follows:

- Generally, the assumption that values can be taught and assessed is contentious and widely debated both internationally and locally.
- Because of its perceived history of betrayal and indoctrination in the past, values education is viewed with suspicion not only by some parents and educators generally, but particularly by previously marginalised sectors of civil society.
- In addition, values education is regarded by some critics as attempts at social engineering so there is uncertainty and scepticism among many educators about the potential of values education (given the internalization of the discriminatory values espoused by apartheid by large sections of society) to transform society.

A course on Assessment in Outcomes-Based Education (OBE) in 2002 that I presented to in-service educators, who had registered for a National Professional Diploma in Education, provided me with the opportunity to observe how educators conceptualised and engaged with the teaching and assessment of values within the Outcomes-based curriculum in their classrooms. On completion of the course, the message that the course evaluation forms conveyed was alarming as 73% of the educators indicated that they were still uncertain about the teaching and assessment of values. This result was not what I expected. It was disappointing and I naturally started thinking about what to do about this.



Subsequently, having listened to the complaints of many educators and student teachers, different perspectives on talk shows on the radio and points of view presented in debates and opinion polls in the media, about “the lack of values and discipline” in schools, I found myself constantly contemplating how South African policies on values education had come about; which events had influenced and shaped these policies, and what would be the best way to understand and engage with values education, values, values acquisition and the assessment of values within the Outcomes-based curriculum and the constraints of practice. It was in this context that this thesis was birthed.

Since its introduction in 1994, the OBE curriculum has been revised and renamed and a number of changes were recommended by The Review Committee of C2005 (DoE, 2000.) These included: the removal of technical jargon, the reduction of the design features from eight to three, the alignment of assessment with the curriculum as new insights and perspectives were developed by The Review Committee of C2005 (DoE, 2000). (I discuss these changes and their implications in subsequent chapters.) So it was assumed that the assessment practices of the curriculum generally had been streamlined, clarified and demystified. But the exclusion of design features, a simplified language, or aligning curriculum and assessment, did not fundamentally change the philosophy or the principles of OBE. For example, the fundamental assumption that values could be assessed and measured within the framework of the assessment model of the OBE curriculum had remained unchanged (The Review Committee of C2005 (DoE, 2000).

In 2004 I presented the module on Assessment in Outcomes-based Education for the second time to a group of educators who had registered for the National Professional Diploma in Education. I was hopeful that with the new recommendations of the curriculum an evaluation of the course would yield better results and that I would not have the same cause for alarm as before. The teaching facilities at the site were any lecturer’s dream; spacious lecture

rooms, ample space to do group work, a group of experienced educators (students) who were eager to share their years of experience and views, overhead projectors that actually worked and duplicating facilities for all. This really inspired me and I looked forward to an exciting and rewarding experience with this group. This was an opportunity to explore the practices on the ground perspective, which is one perspective of this study, on how educators currently conceptualised and addressed values education within OBE in their classrooms and it enabled me to add the perspective of a community of educators to the collection of perspectives I planned to explore.

### **1.3 RESEARCH AIM**

The overall aim of this study was to explore the teaching and assessment of values within the Outcomes Based curriculum of South Africa from different disciplinary and epistemological perspectives. My research was guided by two fundamental ideas from Mouton (1996), firstly, that the world of social science is only one of numerous worlds that we inhabit; secondly that scientific research in whatever paradigm it is presented, is a multi-dimensional activity that is driven by the ideal of the search for truth.

Howard (1991:188) notes that: “Scholars are encouraged to approach any problem of human understanding from a range of epistemological perspectives.” Following Howard, this study was conducted from a multi-disciplinary theoretical orientation, based on the awareness that education, like other disciplines, not only draws upon different disciplines to inform its practice and expand its knowledge base, but is shaped by many factors. Knowledge comes in different forms and formats and this study not only drew on different disciplinary perspectives, but also sought insights from the context of policy development and implementation in one particular setting. This study adopts a hermeneutic approach and is an attempt to explore and interpret the teaching, and assessment of values in South Africa’s OBE curriculum in terms of Gadamer’s (1977) notion of “the fusion of horizons.”

A horizon is the range of vision that includes everything that can be seen from a particular vantage point, (Mueller-Vollmer 1986). I believe that fusion of horizons offers the possibility of seeing the same phenomenon through different lenses. The benefits of this approach is firstly, that it extends the horizon and secondly that an extended horizon can have a fundamentally formative effect on situations, processes, systems or education models as it represents a drawing together of different ways of knowing. This study explores the topic from a different horizon in turn, philosophical, psychological, pedagogical, conceptual and empirical in order to ultimately draw together these different perspectives on the teaching and assessment of values within the South African Outcomes-based curriculum.

An important outcome of this study is to make it possible for readers to construct, shift or fuse their own horizons in the light of the different perspectives offered.

#### **1.4 THE RESEARCH QUESTIONS**

Approaching this topic from different perspectives indicates that there are different research questions, each drawing on different knowledge sources:

- How have education policy- decisions shaped the teaching and assessment of values in South African schools?
- What conceptual understanding of values and values education can best guide policy regarding the teaching and assessment of values?
- What theories of learning can appropriately be applied to the teaching and assessment of values?
- What can the perspectives of local educators contribute to a conceptual analysis of the teaching and assessment of values?

## **1.5 THEORETICAL FRAMEWORKS**

This study engages with the discipline of philosophy of education regarding the nature of knowledge and different ways of knowing, based on the theoretical frameworks and analytical tools proposed by Ryle (1971), which was refined and extended by Mason (1997) and Barnette (1994). It draws on insights and theories from psychology regarding how learning occurs as advanced by the theories of Piaget (1965); Skinner (1971); Vygotsky (1978) and Kohlberg (1963, 1968, 1981) The study further draws on theories and concepts presented by Dewey (1964); Rorty (1990a) Peters (1966, 1973) and Bernstein (1971) whose views provide clarity on the teaching of values and the concept of curriculum. It draws on insights about compassionate citizenship presented by Waghid (2004) and the distinctions made by Mouton (1996) and Kaplan (1964) between the assessment and measurement of values. Finally it draws on insights for the teaching and assessment of values presented in official documents of the National Department of Education (DoE), the Northern Cape Education Department (NCED) and the Western Cape Education Department (WCED).

## **1.6 RESEARCH METHODOLOGY**

A concept is a particular type of word that plays a key role in formal processes of knowledge acquisition, formation and transfer and may be broadly contrasted with everyday or ordinary language use (Du Toit cited in de Vos, Strydom, Fouche & Delpont 2005:424).

In all instances of research, certain concepts are embedded in and constitute the field of research. My background is in philosophy and I have used conceptual analysis as a research tool to explore the meaning of concepts such as values, values education, assessment and measurement of values.

Part of the research takes the form of a case study which enabled me to move “inside classrooms.” Silverman (1997:1) points out that in qualitative

research there is a “commitment to a dialogue between social science and the community based on recognition of their different starting points.” The case study captures this dialogue and presents the starting points, voices, opinions and practices of a particular group of educators in a specific context and does not claim to be representative of or generalisable to other settings. It provides their practices on the ground perspective on the issues and challenges related to values education. Furthermore it highlights and illuminates unexamined aspects of the teaching and assessment of values in an OBE curriculum that might have been overlooked.

The study incorporates a combination of quantitative and qualitative research methodologies as this seemed to be the sensible approach for an interdisciplinary exploration of the topic and the kinds of data that different perspectives and epistemologies could generate. Yin (1994) and Stake (1994, 1995), hold that these methodologies can be judiciously used in conjunction with each other, as they can complement each other. While most of the data were collected through qualitative research methodologies such as personal interviews and group discussions, questionnaires and rating scales were used to obtain numerical data. The case study data are interpreted and presented to provide one of many possible descriptive portraits of how educators presently address the teaching and assessment of values in their classrooms.

## **1.7 DATA VERIFICATION**

Babbie (2001) describes triangulation in qualitative research as the convergence of multiple perspectives that can provide greater confidence that what is being targeted is accurately captured. In this way the reliability and validity of research findings can be ensured. In this study a number of data sources have been used (interviews, documents, observation, field notes, questionnaires, and educator tasks) to ensure the capturing of valid and reliable data. While these different sources of data do triangulate in some respects, it also highlights points of divergence.

## **1.8 SIGNIFICANCE OF THE STUDY**

- It explores an important concern in contemporary education debates, both internationally as well as locally, that has not been satisfactorily resolved and remains contested.
- The topic of this research is believed to be of important educational and social value at this time in South Africa, when answers are being sought on how to restore positive discipline in schools and to improve and restore the morality of society in general.
- It is of practical significance as it draws together insights from different perspectives and sources of data which policy makers and curriculum designers need to consider.
- It opens up the possibility for further debate between academics, curriculum theorists, educators and the general public.

## **1.9 OUTLINE OF THE CHAPTERS IN THE STUDY**

### **CHAPTER ONE**

#### **INTRODUCTION TO THE STUDY**

This is an introductory chapter that describes the motivation for the study, provides the aims of the study and outlines the methodology and research frameworks that will guide it. In addition it gives an overview of the structure of the text and lists the meanings of key terms used in this study.

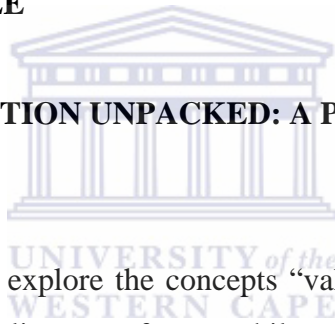
## **CHAPTER TWO**

### **THE CONTEXT OF VALUES EDUCATION POLICY IN SOUTH AFRICA**

In Chapter Two I present a historical narrative of the broad socio-historical context of values education policy and education initiatives that have influenced and shaped values education policy in South Africa. I provide an account of South Africa's curriculum context to orientate readers who may not be familiar with the historical processes and the debates surrounding the introduction of Outcomes-based education in South Africa.

## **CHAPTER THREE**

### **VALUES EDUCATION UNPACKED: A PHILOSOPHICAL PERSPECTIVE**



In Chapter Three I explore the concepts “values education” and “values” as these appear in the literature from a philosophical perspective. I unpack the international and local debates about the meaning of values education, the distinction between values and virtues, the relationship between values and moral education and then turn to an exploration of the relationship between values and citizenship education and the values that should be prioritised in education.

## **CHAPTER FOUR**

### **THE TEACHING OF VALUES**

In Chapter Four I review theories on learning and moral learning to explore the insights and guidelines to be drawn from these that could inform the teaching of values both internationally and locally. I focus on the teaching of

values generally but in particular on the Foundation Phase as an illustrative example. My rationale for this focus is that the literature indicates that it is during this Foundation Phase, that the foundations of values education ought to be laid as it is during this phase that learners tend to be most receptive to influences of values.

## **CHAPTER FIVE**

### **THE ASSESSMENT OF VALUES**

The central aim of Chapter Five is to present different perspectives on the assessment of values. I explore different perspectives on the assessment of values internationally and then contrast these with the perspectives on assessment put forward in the curriculum and the implications of this for the assessment of values education in South Africa.

## **CHAPTER SIX**

### **METHODOLOGY OF THE EMPIRICAL CASE STUDY**

In Chapter Six I provide the research methodology of the empirical study. The research takes the form of a case study which incorporates a combination of quantitative and qualitative research methodologies as this seemed to be the sensible approach for an inter-disciplinary exploration of the topic and the different kinds of data that it could generate. While most of the data were collected through qualitative research methodologies such as personal interviews and group discussions, questionnaires were used to obtain numerical data.



## **CHAPTER SEVEN**

### **THE CASE STUDY**

In Chapter Seven I present the findings of a case study of a group of educators that are presently engaging with the curriculum in terms of values education. The findings present one of many possible portraits of how educators currently address the teaching and assessment of values in their classrooms. The case study perspective complements and illuminates the theoretical and conceptual underpinnings of the study.

## **CHAPTER EIGHT**

### **DISCUSSION AND RECOMMENDATIONS**

Finally in Chapter Eight, I provide insights that have emerged in response to the research questions that framed this study. These insights are integrated with the case study data and different perspectives on the teaching and assessment of values are drawn together. I offer some recommendations that might enhance the teaching and assessment of values in local schools.

## 1.10 KEY TERMS

Outcomes-based education

- Education policies and curriculum based on outcomes.

Curriculum 2005;

- The curriculum that was developed within the framework of outcomes-based education

The Revised Curriculum Statement;

- The revision of Curriculum 2005

The National Curriculum Statement;

- The curriculum that emerged from the review of Curriculum 2005

The curriculum;

- In this study the curriculum refers to the National Curriculum Statement which is the formal curriculum that currently operates in South African schools.

Assessment;

- The collection of information as evidence of learning in schools

Measurement;

- The quantification of evidence of learning in schools

## **CHAPTER 2**

### **THE CONTEXT OF VALUES EDUCATION POLICY IN SOUTH AFRICA**

#### **2.1 INTRODUCTION**

In this chapter I present a historical account of the broad socio-historical contexts and initiatives that have informed and shaped values education policy in South Africa. I believe this to be important as it explains the rationale for the inclusion of values education and the assumptions and expectations about the teaching, assessment and measurement of values that are embedded in the curriculum of South Africa.

#### **2.2 THE SOCIO-POLITICAL AND EDUCATIONAL CONTEXT PRE-1994**

Perceptions and meanings of values in societies have evolved and been refined throughout history. This tendency is reflected by changing policies on values education. For example Veugelers (2003) holds that during the sixties the main emphasis of values in the educational system in the Netherlands was conformity and adaptation to society. Wringe (1998) suggests that in the 1970s values education was legitimized in terms of hierarchical power, tradition and religious belief. Ryan (1989) concurs with this view and suggests that values education in America, during this period was characterised by authoritarianism.

Similarly in South Africa perceptions about values have also been influenced by events of history. It is not my intention to provide a detailed account of all events, but merely to provide a brief sketch of some events that are generally considered to have been instrumental in shaping perceptions for the inclusion

of values education in the curriculum. Kallaway (1990) has pointed out that the issue of education under apartheid has provided one of the most fascinating anomalies in modern education history. For those schooled under apartheid, who were educators in state schools, who marched and supported the struggle for liberation from the seemingly endless cycle of resistance, it was often difficult to imagine a world without injustices and the restrictions that apartheid education wrought.

The ideological underpinning of the system of Apartheid was the notion of separate development of races (Christie, 1986). Consequently, not all state schools followed a common national curriculum. Nineteen different educational departments were established for different races in the 1960s and 70s. Racial stereotyping was promoted both explicitly through the formal curriculum and implicitly through what is referred to as the “hidden” curriculum by Christie (1986) and others. These mechanisms in line with the separatist ideologies of the time reinforced perceptions about differences: the inferiority and superiority of races and sexes.

Buckland (1982) and Christie (1986) maintain that an understanding of the hidden curriculum is crucial for an understanding of how specific values were implicitly transferred through education in pre-transition South Africa. Buckland claims that to ignore the hidden curriculum, is to ignore important features of the socialization of children under apartheid, as it was through this mechanism that schooling implicitly indoctrinated and prepared children with values for life under apartheid. Socialization occurred through the influence of particular value systems and practices in schools and society which were communicated implicitly or explicitly in schools (Christie 1986) through legislation, which resulted in intended or unintended consequences such as the Soweto uprising of students of 1976. Furthermore, the division of races emphasised differences between people which resulted in divisions of class, gender, religion and mother tongue (Christie 1986).

In this way through the hidden curriculum and in many other ways, apartheid had entrenched racism and separatism in all aspects of societal life; it affected and shaped identities of people from the cradle to the grave. With regard to education for example, Christian Nationalism, the ideology of the National Party took its direction from the notorious Christian National Act (39 of 1967) which reflected the perspective of Afrikaner Nationalism and propagated notions of separate identities and the superiority of whites within a framework of traditional Christianity (Kallaway 1990). Christian National Education and the Fundamental Pedagogics policies which it promoted were part of the suppressive state apparatus that became instrumental in facilitating the reproduction of the dominant ideology of apartheid through education (Enslin, 1984).

On the other hand, People's Education which emerged from the liberation movements propagated the values of a non-racist, non-sexist, democratic society (Kraak, 1998). It is not surprising that the terminology, values and discourses of transformation embedded in People's Education exerted strong influence on the educational discourses after 1994. Cross (1992) and Hyslop (1990) point out that the philosophy of black consciousness that emerged in the late sixties which similarly emphasised the need for liberation and unity, played a powerful role in the political conscientization and mobilisation of the youth of South Africa.

Cross and Chisholm (1990:58) have identified the black consciousness movement as a formative element of the struggle for liberation and democracy in South Africa:

The black consciousness movement was rooted in the increasing alienation of black youth from the prevailing political, economic and social structure and the attempts to inculcate conformist modes of behaviour, passivity, psychological and racial inferiority through various agencies of social control, particularly education.

These views and comments demonstrate the convergence between political objectives and the values promoted through education that dominated the pre-1994 period. So, this contestation of values between inter-dependent parties of radically different value orientations provided the platform for fundamental political and educational transformation in South Africa. Morrow (2001) explains that the project of transforming an education system is one of changing the vast web of practices that constitute it. This was the enormity of the task that awaited the post-apartheid government.

### **2.3 THE SOCIO- POLITICAL AND EDUCATIONAL CONTEXT POST-1994**

As demonstrated above there was a convergence between political objectives of the state and the values, albeit implicitly, promoted through education. Curriculum theorists generally agree that there is often an implicit alignment between the ideals of states and their curriculum specifications (Bernstein, 1971; Malcolm, 1999). An exploration of policies relating to education in post-apartheid South Africa indicates a similar convergence between political objectives and values enshrined in the Constitution of South Africa. Harley and Wedekind cited in Chisholm (2004:198) concur with this view but claim that: “what makes C2005 distinctive in aligning itself to political values is the explicit way in which it does this.” Such claims provide the foundation for commonly held perceptions among critics such as Jansen (1999) and Harley & Wedekind (2004) that the curriculum of South Africa has an explicit political agenda. In its Preamble the Constitution speaks directly to the issue of social and moral renewal:

We therefore... adopt this Constitution as the supreme law of the Republic so as to heal the divisions of the past and establish a society based on democratic values, social justice and fundamental human rights (Constitution of the Republic of South Africa, Act 108 of 1996).

Given the socio-political objectives of the new government it is therefore not surprising that the discourse on values in education in South Africa is firmly grounded within the founding documents of society; the Constitution of South Africa and the Bill of Rights. These documents articulate the ideological ethical and moral standards of how people ought to interact with each other as citizens in a democratic society. As a result of this political grounding the inclusion of values in the curriculum has been criticized by Jansen (1999) as an exercise to enforce the political agenda of the state.

The introduction of a Bill of Rights (Constitution of the Republic of South Africa, Act 108 of 1996) provides members of society with freedom of choice in terms of their value orientations and religious convictions. Forster (2001) has pointed out a paradox that liberal democracies inevitably face when confronted with questions of values. It is generally believed that it is appropriate within a liberal democratic society that individuals have the right to commit themselves to particular value systems. But liberal democratic societies simultaneously depend on adherence to common democratic values for their continued existence. Waghid (2004) agrees with Forster and points out that, for democracies to function effectively, the quality and attitude of their citizens to participate in the political process to promote the public good is crucial. Kymlicka (2002:285) lends support to Waghid's view and maintains that "without citizens who possess these qualities, democracies become difficult to govern, even unstable." So there appears to be agreement that while individuals in democracies are entitled to personal choices in respect of their value systems, they also have a responsibility to commit themselves to a common value system for the good of society.

It seems that the tension between personal and common values raises broader philosophical questions about the assumptions and expectations that people have about citizens in democracies. For example, the perceived expectations of the justice institutions of South Africa; the Constitution and the Bill of Rights, that people will embrace democratic values because they are citizens

of a democratic society, seems idealistic and unrealistic as it ignores the tension, social and moral complexities that exist between choices of personal and common values. My observation is that the pre-conceived assumptions and expectations about how citizens in democracies ought to conduct themselves, and the tension between personal and common values, is perhaps largely responsible for a growing perception that social morality in South Africa is not developing in the way that many people hoped it would when the country became a democracy.

In the following sections I trace the social, political and educational initiatives that in South Africa have been instrumental in the inclusion of positive democratic values in the curriculum. My objective is to establish in what ways these initiatives have influenced the inclusion of values education in the curriculum.

#### **2.4 THE INFLUENCE OF THE MORAL REGENERATION MOVEMENT ON VALUES EDUCATION**

The foundation of the Moral Regeneration Movement (MRM) can be traced back to a meeting between ex-President Nelson Mandela and key religious leaders in June 1997 (Rauch, 2005). This meeting was initiated, organised and supported by various African National Congress (ANC) officials and was arranged by the ANC's Commission on Religious Affairs, a party structure that was formed in exile and which is still operational today. Toko Xasa Eastern Cape MEC of Social Development in a speech delivered to stakeholders on 11 May, 2006, explained the purpose of the MRM as follows: "...it is aimed at the regeneration and restoration of the moral fibre of society ...governed by acceptable human values and moral standards." It was anticipated that this quest for moral rejuvenation would provide a solid foundation for all citizens to become morally and socially responsible citizens.



According to Rauch the two main aspects that informed this structure's conceptual understanding of the concept of moral regeneration were religion and politics. Both religious and political attitudes in South Africa were being reassessed in ways which promised a critical and constructive relationship for the nation. This understanding is based on the premise that traditional religions and cultural beliefs both uncover the essence of humanness. The key concern of this meeting was twofold; to muster support from all religious communities for the MRM and to clarify and articulate the role of religion in social transformation, given the fact "that religion and religious education have for many years been regarded as a major vehicle for moral education" (Priestley, 1987: 107).

At this meeting Mandela highlighted the spiritual malaise underpinning the escalation of criminal activity that had become endemic in South African society and called on religious leaders to become active participants in a campaign that was subsequently known as the Moral Regeneration Initiative (MRI) (Rauch, 2005). A consequence of this meeting was the establishment of a permanent body for interaction between religious leaders and government; the National Religious Leaders Forum (NRLF). The initiative taken by this forum to engage and promote the re-examination of spirituality and morality as part of social transformation is significant, as it provided the platform for moral discourse and subsequent initiatives on moral regeneration.

Ex- President Mandela began using the phrase "moral regeneration" in early 1998. He argued that people must be ready to give back to society part of what they gain from it. This is perhaps one of the earliest indications of the revival of moral discourse in South African society. At this initial stage the meaning of the concept moral was not clarified and it was used fairly loosely, but generally understood to be linked to notions of patriotism and citizenship. Mandela's call to religious leaders according to Rauch, culminated in a moral summit that was held in Johannesburg in 1998. At this meeting moral

behaviour was perceived quite narrowly as constituting the avoidance of crime, violence and corruption.

President Nelson Mandela again referred to the moral degeneration of society in his farewell speech before Parliament in 1999. He identified and acknowledged the tension between personal and social values by again referring to the increasing levels of corruption in society and recommended that our nation needs as a matter of urgency, a reconstruction and development plan of the soul. The significance of this speech is that it signalled a shift from the earlier emphasis on criminal activities that had been the recurring theme of the moral regeneration movement. During this speech ex- President Mandela referred more broadly to civic values and duties such as good citizenship, and respect for the rule of law as examples of morally regenerative activities. According to Rauch (2005) the emphasis on responsible citizenship was motivated by the new government's need to transform the negative perceptions of its electorate about its relationship with the state. And so the new post-1994 government declared its commitment to key values of human dignity, non-racialism, non-sexism and democracy (Constitution of the Republic of South Africa, 1996).

The development of social policy within a framework of human rights had evidently failed to produce the desired effects as the intended implementation of policy and the actual implementation of policy proved to be two entirely different processes. Bush and West-Burnham (1994:12) refer to this phenomenon as the implementation gap while Mahomed, quoted in Jansen and Christie (1999:168) refers to this seeming inability of policies to connect with the reality of practice as "the reality principle." Another ANC contribution to the early conceptual underpinnings of the moral regeneration initiative is the notion of an African Renaissance. This concept marries pride in being an African and a new morality that would be facilitated through moral regeneration. It appears that the most important expectation underpinning the notion of the African Renaissance is that it will enable the

birth of a morally regenerative society; one which will be thoroughly moral and spiritual.

In his opening address at a moral summit in April 2002, the then Deputy President Zuma, projected a more inclusive view and deeper understanding of morality when he acknowledged that morality issues go beyond religion and crime. This was an indication that earlier ANC notions that religion and exhortations to avoid crime could play a definitive role in stemming the moral degeneration of society had not produced the desired results. It was at this juncture that the notion of common moral values was introduced into the moral regeneration discourse.

At the Fourth Annual Mandela Lecture held in 2006, the then President Mbeki reiterated some of the earlier assumptions and acknowledged that the causes of moral degeneracy are historical. This signalled that earlier ANC perceptions about the nature of morality had undergone decisive change and that the prevention of criminal activity alone did not constitute what moral degeneration is about. He identified the deconstruction of common and personal values as the root causes of a degenerate society.

In his view materialism had replaced the democratic principles of the liberation struggle: social cohesion, human solidarity and reconciliation, in short, he claimed that society had lost its anchor. This reference to an anti-social human order captures the perception of a culture of entitlement, personal enrichment and corruption that had seemingly become endemic at all levels of society.

The reference to a culture of entitlement is a theme that had gained prominence in the discourse of the ANC-led tripartite alliance. Its significance lies in the fact that it demonstrated a changed perception about the origins of the moral malaise; from one that was purely historical, looking

at pre-transition South African history for its causes, to a more contemporary and contextualised analysis of it.

## **2.5 VALUES EDUCATION POLICY INITIATIVES**

The literature on values in education in Western countries generally indicates that there is a strong belief that education can and should play a more active role in the development and nurturing of democratic values (Gutmann, 1987; 1995; Fine, 1995). According to Goodman (1998) in the United States, for example, with increasing urgency the public, press and President, enjoin schools to reverse the collapse of morality and to influence the character of children by teaching sound positive values. So it appears that across different continents educators, parents, political and religious leaders agree that values education can lead to social transformation and contribute to the moral regeneration of society.

At the establishment of South Africa's first democratic government in 1994 the then Minister of Education S. Bengu, had already announced that all forms of racial discrimination should be removed from educational institutions in line with the 1993 Interim Constitution. The South African Department of Education (DoE) launched the Tirisano (which means working together) Project in 1999. The goal of this project was to oversee the implementation of the new outcomes-based education system in keeping with the spirit of the Constitution and the Bill of Rights of 1996. The discussions of this project paved the way for a "Values, Education and Democracy" initiative. This idea was not unique to South Africa, as a similar initiative had been undertaken in England according to Smith & Standish, (1997). They point out that a statement on shared values was produced in England by the National Forum on Values in Education and the Community in 1997. In his opening address of the Inaugural Meeting of the Consultative Forum on Racism in 1999, the then Minister of Education Kader Asmal, announced that

he would bring together a collective of academics, politicians, researchers and educators to deliberate about common values in society.

The values and attitudes of many South Africans were formed in a divided, separatist society and the aim of this ministerial initiative was twofold; firstly, to reflect on the quality of the national character to which people in a democratic South Africa ought to aspire and secondly, to consider the mechanisms by which education can best support the development of these values. Two initiatives of the DoE that influenced debates on values education were: The Report of the Working Group on Values in Education (DoE 2000) which constituted a first discussion of value issues, put forward for public debate and response. This working group proposed the promotion of six values: equity, tolerance, multi-lingualism, openness, accountability and social honour. This initiative was the starting point towards identifying the values that would ultimately be included in the education curriculum.

The Report of this Working Group culminated in the second initiative known as the Saamtrek Conference on Values, Education and Democracy in the 21<sup>st</sup> Century (DoE, 2001). The recommendations of this conference resulted in The Manifesto on Values, Education and Democracy (DoE, 2001).

In October 2002 several schools such as Vryburg and Bryanston High; Ben Viljoen School, Rydal Park and Balfour High were plagued by incidences of racial intolerance and incidences of violence which made headlines in the national media and created impressions and perceptions among civil society that the racial integration policies of the State for schools had failed dismally (Soudien & Sayed, 2004). Many other schools across the country reported no such incidences, but in some cases where such racism had occurred, it had been hidden from the lenses of the media.

Reports from the local media generally, seemed to suggest that the roots of these problems were to be found in the socio-political contexts in which

schools are situated. Township schools, according to the views expressed in the media in particular, seemed to be unaffected by racial incidences. The common reason given for this is that the racial demographics at these schools had largely remained unchanged. Very limited numbers of white learners had yet moved into township schools but conversely, significant numbers of learners from other race groups had moved into previously white suburbs and schools (Soudien & Sayed, 2004).

There is therefore a perception that the implementation of racial desegregation policies for schools had lacked coherence which hampered effective implementation (Soudien & Sayed, 2004). Given this perceived lack of attention to social integration and racial integration at schools, the introduction of values education has been seen by critics such as Jansen (1999) and Soudien and Sayed, (2004) as an intervention strategy to salvage some credibility for the disorganised process of racial integration at schools.

The Manifesto identified and prescribed ten values for inclusion in the National Curriculum; democracy, social justice and equity, equality, non-racism and non-sexism, “ubuntu” (human dignity), an open society, accountability, the rule of law, respect, and reconciliation. The key value is clearly the value of human dignity that is asserted in Sections 1 and 36 of the Constitution: human beings are worthy of respect. According to Asmal and James (2002) this principle provides the foundation for the rights entrenched in our Bill of Rights. These values have historically been embedded in webs of political, social and cultural assumptions that may have profound implications for personal and common values. Therefore a question that needs to be asked is; what are the underlying assumptions and expectations for values education embedded in the Manifesto?

Firstly, it appears that the Manifesto uncritically assumes that values is a transparent concept that can be un-problematically prescribed to a society in which there seems as yet, to be limited inter-subjective understanding of the

meaning and importance of democratic values and the reasons for taking them seriously. This approach of prescription according to Jansen and Christie (1999) has developed a conception of values education policies as policy by declaration. This is a process whereby certain expectations are attached to policies; for example it is expected that the prescription and inclusion of values in the curriculum will un-problematically transform schools previously seen as racist, into non-racial institutions in a rational, linear way.

Secondly, the Manifesto seems to ignore the important point of values as social constructs. It assumes that existing value-systems which are embedded in society can be extricated from the historical and socio-political contexts in which they have been formed and be replaced with new value-systems. Thirdly, the Manifesto seemingly ignores the tension that exists between personal and common values and the implications of this for a society that shares a history of differences rather than commonalities. Fourthly, the Manifesto un-problematically appears to assume that values can be taught and that teachers will have the pedagogical expertise, theoretical knowledge and conceptual understanding required to do this.

Fifthly, the Manifesto creates the impression that the school is the only setting in which values education is likely to occur and the differing roles of parents, religious communities and government as potential agents of moral education are not fully acknowledged or sufficiently specified. The inclusion and *assessment* of values in the school curriculum may have created the impression that the teaching of moral knowledge, over and above academic knowledge, is primarily the responsibility of educators. In this way the role of parents and others who ought to share the responsibility of inculcating and nurturing positive values may have been minimised or under played.

Perhaps the most fundamental criticism that has been levelled at the Manifesto is that it is trapped in behaviourist principles from which it will be difficult to extricate itself (Jansen 1999). Behavioural psychology assumes

unanimity of behaviour: by claiming that in the same environment and under the same circumstances all learners will behave in the same way according to prescribed outcomes (Watson 1913). It is impossible to miss the strong positivist notions (that it is possible to establish universal laws of human behaviour) that are embedded in these assumptions. Furthermore, the behaviourist approach to education has been critiqued as a form of moral indoctrination by many scholars (see Morrow & Beard, 1981; Jansen, 1999; and Parker & Harley, 2001). Kraak (1998) commenting on the powerful influence of behaviourism on the curriculum explains that behaviourism has led to a hybrid educational methodology, which politically has sought to go beyond the narrow confines of competency models by incorporating the progressive pedagogic principles of People's Education. He claims that this has created a learning methodology that is simultaneously radical in discourse yet behaviourist in its assessment technology.

The educational role of the Manifesto was to recommend common social values, which through education could foster social cohesion and support the transformation of society. Based on the recommendations of strategic initiatives of the DoE namely the Report of the Working Group on Values in Education (DoE, 2000), the Saamtrek Conference on Values, Education and Democracy (DoE, 2001) and the Manifesto on Values, Education and Democracy (DoE, 2001) the following values have been identified for inclusion in the curriculum: equity, tolerance, multilingualism, openness, accountability and social honour. The Manifesto (DoE, 2001: 9-10) notes the following about education and values:

Values and morality give meaning to our individual and social relationships. An education system does not exist simply to serve a market... Its primary purpose must be to enrich the individual, and by extension the broader society ...

After its inception the real role of the Manifesto and its relationship with values education has been questioned by various sources. Jansen (1999) for



example, points out that the Manifesto could be seen as an attempt to cover up the flaws of Outcomes based education and the failure of the government's racial integration policies that became apparent in schools in 2002 (see also Soudien & Sayed, 2004). Jansen sees the Manifesto as an uncritical emulation of international education policies (or elements of such policies) that lacks careful thought and consideration of the South African context. He and others believe that the Manifesto represented an attempt to emulate the values initiatives that were popular in other countries for example, in England at the time, as Smith and Standish, (1997) have pointed out.

The framework of the Manifesto assumes that educators have the expertise to navigate impartially between conflicting value-orientations that may co-exist in the same classroom. South African society is fraught with inequalities; issues of poverty, unemployment and inequalities between race and class and these structural constraints and social differences need to be acknowledged, considered and addressed in conjunction with policies for values education. It is assumed in the Manifesto that the teaching and acquisition of values in schools can be divorced from social contexts, competing sub-cultures and different value orientations that operate concurrently in a pluralistic society. The lack of attention to social context as is evident in the Manifesto, assumes that South Africa is an egalitarian society and does not recognise the differences between social conventions, social etiquette, traditions and social norms that exist concurrently in society

Apart from its internal challenges, South African society has in recent years also been exposed to globalization, new technology and greater mobility which have all impacted on the value orientations and belief systems of people as they are exposed to different value orientations and cultures both locally and internationally. It is therefore generally acknowledged that value formation for young people both locally and internationally, presently occurs within a global-social context that is constituted by the remnants and

fragments of a multiplicity of de-constructed value orientations, cultures, webs of belief systems, politics and traditions (MacIntyre, 1981).

Since the inception of South Africa's democratic Government in April 1994, education policies have been formulated within the framework of the democratic principles of the Constitution and Bill of Rights of 1996. A survey of literature on values in education in South African reveals that various authors have given attention to the dynamics of values in education in the transition period after 1994. For example Badat (1995); Collins and Gillespie (1993); Christie (1993); Soudien and Sayed (2004)) have researched the process of racial integration in South African schools and classrooms. Penny, Appel, Gultig, Harley, and Muir (1993) have researched the process of democracy and participation in schools, while Sayed and Carrim (1997) have explored school governance. Research has been also conducted on various aspects relating to values, virtues and morality locally.

Rhodes and Roux (2000) have identified values and beliefs in an outcomes based curriculum; Schoeman (2000) has researched teaching Citizenship Education within the Human and Social Sciences learning area and Green (2004a, 2004b) has investigated educators' perspectives and educators' practices in the nurturing of democratic values. Afrika, Absalom, Ackerman, Sijula and Green (2008) have recently researched various aspects relating to the nurturing of values in schools.

In looking at the relationship between values initiatives and the curriculum, different questions from those that have already been researched are introduced and addressed in various chapters in this study. For example what constitutes values education? Which values should be given priority and for what reasons? What do theories of learning suggest in respect of the teaching of values? What are the implications of the integration of education and training for values education? What are the practical consequences of the assumption that values can be assessed and measured?

## 2.6 SOUTH AFRICA'S CURRICULUM CONTEXT

### 2.6.1. HISTORICAL PROCESS AND CURRICULUM AIMS

The National Department of Education published its first official statement on Outcomes-Based Education (OBE) entitled Curriculum 2005: Lifelong learning for the 21<sup>st</sup> Century in March 1997 (DoE, 1997.) Jansen and Christie (1999: 9) maintain that:

There remains to this day confusion about what is meant by Curriculum 2005. For some people it meant a deadline; the year by which OBE would be introduced in grades 1-7, to some department officials C2005 and OBE meant the same thing; and to some academics C2005 is a model for teaching effectiveness.

The new curriculum's outcomes based design feature was so centrally positioned that outcomes-based education became synonymous with C2005. In the public domain outcomes-based education and C2005 are therefore still conflated and seen as interchangeable to the extent that there is rarely a debate on outcomes-based education without reference to C2005. An important difference between OBE and C2005 as I understand it is; OBE is an approach to education while C2005 is the curriculum that was developed within an outcomes-based framework. In the next section I provide a general overview of OBE. In chapter four I discuss its implications for the teaching of values and in chapter five its implications for the assessment of values.

The aim of C2005 is directed towards achieving a prosperous, truly united, democratic and internationally competitive country with literate, creative, and critical citizens leading productive, self-fulfilled lives in a country free of violence, discrimination and prejudice (Curriculum 2005: Lifelong Learning for the 21<sup>st</sup> Century DoE, 1997) and that all learners should reach their full potential and be prepared for meaningful participation in society as critical democratic citizens, who embrace the principle of lifelong learning (Report of the Review Committee on C2005, DoE, 2000). This approach is based on the

belief that all learners need to and can achieve their full potential, but that this may not happen in the same way or within the same period of time for all learners.

There have been several commentaries and criticisms of C2005 since its inception in 1997/8. Rasool (1999) and Jansen and Christie (1999) provide a summary of some of these criticisms and explain that, the language of OBE was too complex; that no relationship existed between curriculum change and economic growth, that OBE was based on flawed assumptions of what happens inside schools, and that its emphasis on procedural knowledge offered an instrumentalist view of knowledge. Furthermore, the fact that learners must discover knowledge for themselves involved limited teacher participation, but multiplied teachers' workloads, while it trivialised content. Rasool also brings to our attention that OBE lacked appropriate assessment systems and that it side-stepped the issue of values.

Following the problems educators experienced in understanding the technical terminology and implementation of a complex matrix of concepts such as range statements, performance indicators and assessment criteria as well as 66 specific outcomes for the nine years of the General Education Phase, (Gultig, Hoadley & Jansen, 2002) the Ministry of Education commissioned a review of C2005 in 2000. The structure and design of C2005, teacher orientation, training and development, learning support materials, provincial support to teachers in schools and implementation time-frames are some of the concerns that the Review Committee was required to address.

However as Harley and Wedekind quoted in Chisholm (2004:214) have pointed out: "The Review was constrained by its brief to review C2005 and not outcomes-based education" so the philosophy of OBE and its approach to education was retained in the Revised National Curriculum Statement (RNCS) currently referred to as the National Curriculum Statement (NCS).

***Henceforth reference to curriculum in this study is to be understood as reference to the official, national curriculum, known as the National Curriculum Statement, (NCS) and should be distinguished from C2005 and the RNCS.***

The Report of the Review Committee on C2005 (DoE 2000:38-48) pointed out that the problems experienced with C2005 were owing to:

- Incoherence, incompatibility, and flaws in the design of the curriculum structure; and
- Poor implementation, planning and execution and not as a result of OBE.

It is therefore not surprising that according to Report of the Review Committee on C2005, (DoE, 2000), the curriculum *streamlines* and *strengthens* C2005 and continues to be committed to OBE. Outcomes-based education is viewed as part of the process of transforming education and training to realise the aims of our democratic country and of the Constitution.

Numerous other critical inquiries which focus on different aspects of the curriculum have been undertaken. For research findings on the epistemological underpinnings of the curriculum, see Christie (1998) and Jansen (1999). For information on research of curriculum implementation see Taylor and Vinjevoldt, (1999) Harley and Wedekind, (2004). For findings on its operational features see Jansen & Christie, (1999) and Greenstein, (1997). These studies generally reflect deep scepticism about the curriculum as appropriate vehicle for educational development and transformation in South Africa.

## **2.6.2. TEACHING AND LEARNING PRINCIPLES**

### **TEACHING IS OUTCOMES BASED**

What does an outcomes-based education system mean? For Spady (1995) a major influence on curriculum thinking in South Africa since 1994, outcomes-based education means clearly focusing and organizing an educational system around learning outcomes. These specify what is essential for all students to be able to do successfully at the end of their learning experiences. Outcomes-based education starts by designing the outcomes to be achieved by the end of the learning process in all learning areas. The outcomes describe the knowledge, skills and values which learners should acquire and demonstrate on completion of the learning experience (Report of the Review Committee on C2005, DoE, 2000).

### **TEACHING IS LEARNER CENTRED**

OBE is described as a result-oriented, participatory, learner-centred, activity-based approach to the teaching and learning of knowledge, skills and values (Report of the Review Committee on C2005, DoE 2000). The outcomes encourage a learner centred and activity-based approach to teaching. Drawing clearly on constructivist principles learners are required to discover their own knowledge by making links between prior knowledge and new content and ideas. Teaching towards critical outcomes, developmental outcomes, learning area outcomes based on a constructivist approach to learning, limits or expands indefinitely the choices of educators to the extent that what falls in and outside of the educative process has become uncertain.

## **TEACHING IS INTEGRATED**

Integration refers to connecting or combining content, knowledge, skills and values across learning areas that have been separated, erasing boundaries that have been imposed, or collapsing the boundaries between disciplines, thus facilitating unrestricted penetration and exchange of ideas between different areas of learning. According to Kraak (1998: 21-58) the idea of “seamless learning” or integration is typical of Outcomes Based Education and Training (OBET), it is based on an assumption of the ease of the transfer of learning between different learning areas.

But policy also adopted a second application of the term integration so that two different meanings are borne by the concept integration in the discourses of education and training namely; certification and pedagogy. Firstly, as pointed out by Christie (1997) it refers to integration of certification, the bridging of different qualifications for academic education and manual training and secondly, it denotes integration of pedagogy and curricular content. Muller in Chisholm (2004: 227) explains that: “for the administrative progressives in the Department of Labour and the pedagogic progressives in the Department of Education integration meant quite different things.” Although there is some overlap in the education and training mandates so that at times these could intersect, there are very important differences in terms of conceptual understanding, vocabulary, categories of knowledge, pedagogy, knowledge acquisition, application of knowledge, assessment, assessment instruments and measurement of competences that are distinctive of education and training.

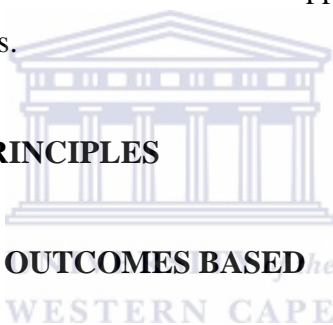
Following Bernstein (1986), integration refers to connecting or combining what has been separated, erasing boundaries that have been imposed, or collapsing the boundaries between disciplines, thus facilitating unrestricted penetration and exchange of ideas between different areas of learning. Such integration may be achieved through many processes for example; Carrim

and Keet (2005:101) have identified infusion as one of the mechanisms through which integration is facilitated;

Infusion then, refers to a technique of curriculum design that aims at integration. It is a way of designing curricula so that the different contents may be brought in relation to one another, disciplinary boundaries pierced or collapsed or subjects areas linked to one another.

Given this interpretation of integration as the integration of curricular content it is positive and desirable in some respects. The curriculum is appropriately designed to integrate content across learning areas so that learners may come to know and experience the world as a set of inter-connected knowledge systems. In this way vertical and horizontal knowledge is combined to facilitate knowledge construction and the application of knowledge which is beneficial to learners.

## **2.7. ASSESSMENT PRINCIPLES**



The curriculum is aligned with the assessment policy contained in the Assessment Policy (Government Gazette No 19640 of 1998). The Western Cape Education Department has also issued a policy document entitled Assessment Guidelines for the General Education and Training Band (gradesR-9) (WCED, 2003). The aim of this document is to provide assistance in developing and implementing an assessment programme for Grades R-9 in schools. Outcomes-based education and its assessment model introduced educators to a number of assessment terms for example; norm-referenced and criterion-referenced assessment, assessment standards, assessors, assessment instruments and different types of assessment. Jansen and Christie (1999) point out the fact that more than 100 new words were introduced onto the curriculum landscape by OBE.



Assessment within the curriculum is based on the prescribed learning outcomes and assessment standards as indicated in the NCS. Assessment standards describe the level at which learners should demonstrate their achievement of the learning outcomes of the learning areas. Assessment Standards are now grade specific, showing what is expected of learners in each grade and how conceptual progression will occur in each learning area (Report of the Review Committee on C2005, DoE, 2000).

### **ASSESSMENT IS INTEGRATED**

Integrated assessment assesses competence across a number of outcomes in an integrated manner so it is not really a type of assessment, but rather a way of conducting assessment. Integrated assessments are deliberately structured to assess the ability of the learner to see the bigger picture that is, to integrate different learning outcomes in terms of knowledge, skills and values and to demonstrate understanding of the interrelationship of these across learning areas (Hager, Gonzi & Athanasou 1994). It provides the learner with an opportunity to demonstrate the ability to integrate knowledge, skills, theory and practice, in a way that reflects the appropriate combination of practical, foundational and reflexive competence. The task of the educator is to interpret the performance of learners and make a judgement about the learner's competence to integrate different outcomes in the light of the criteria. This indicates that integrated assessment is a lot more complex than sorting items where criteria are usually observable, and measurable.

### **ASSESSMENT TAKES VARIOUS FORMS**

Assessments are not only conducted by lecturers, educators, instructors or formally registered assessors and there are four main types of assessment for different purposes according to the (Report of the Review Committee on C2005, DoE, 2000).

**Baseline Assessment:** The purpose is to determine the level at which the learner is able to function (prior knowledge) in order to pitch the learning at the correct level for the learner. It assists in planning teaching and learning activities.

**Diagnostic Assessment:** The purpose is to determine the nature and causes of barriers to learning. Guidance, support and appropriate interventions follow such assessment.

**Formative Assessment:** The purpose is to determine the progress the learner has made towards the outcomes. Formative assessment takes place on a continuous basis throughout the teaching/learning process. It is developmental and is built into the learning activities so that it is not something that occurs as a separate part of the learning programme. Its main purpose is to determine the learner's progress towards achieving the specified outcomes so as to improve learning. Constructive feed forward is given.

**Summative assessment** is aimed at assessing whether a learner has successfully achieved the outcomes of a learning programme or not, in terms of being awarded a credit, qualification or certificate. Its purpose is to judge whether or not the learner has achieved the outcomes described for the module or programme. It is generally conducted at the end of a learning programme, at the end of a term, year, or on transfer to another school. The learner must be informed and must clearly understand when an assessment is summative. (Report of the Review Committee on C2005 (DoE, 2000))

### **ASSESSMENT IS BASED ON APPLIED COMPETENCE**

The importance of applied competence is also stressed by the curriculum which is described as follows: Applied competence is the ability to put the learning outcomes that have been developed through a learning programme into practice in the relevant context. Competent learners must be able to

understand what they have learnt and must also be able to do something useful with this knowledge in a real-world context. Integrated competence refers to the following competences:

- Practical competence: The demonstrated ability to perform a set of tasks – to do a particular thing, to consider a range of options/possibilities and make decisions about putting it into practice.
- Foundational competence: The demonstrated understanding of what learners are doing and why.
- Reflexive competence: The demonstrated ability to integrate or connect performances with understanding of those performances, so that learners learn from their actions, and are able to adapt to changes and unforeseen circumstances.

### **ASSESSMENT ACTIVITIES SHOULD TEACH**

The assumption of the outcomes-based curriculum is that teaching, learning and assessment should be *linked*; assessment should inform teachers and others about the performance of learners towards the achievement of the learning outcomes and even more strongly that teaching, learning and assessment should be *inextricably* linked. Assessment has been furthermore been promoted as “*a critical element*” and an *integral* part of education

Furthermore, it is understood that assessment activities should *teach*; teaching, learning and assessment should be *interrelated* and that assessment is *essential* to outcomes-based education. Assessment policy documents in South Africa also indicate that appropriate assessment practices are considered to be essential for the successful implementation of an Outcomes-based curriculum (Western-Cape Education Department (WCED) Assessment Guidelines for the General Education and Training Band Grades R-9, 2003).

## 2.8. AN INTEGRATED APPROACH TO EDUCATION AND TRAINING

Kraak (1998) noted the following influences on the decisions to adopt an outcomes-based model:

- The discourses of transformation and People's Education that emerged in the heat of the struggle for liberation.
- The ascendancy of competence-based modular education and training in industry after 1985
- The adoption of Australian and British outcomes models through the involvement of COSATU and the ANC

The integration of education and training is part of a vast number of policies adopted by the post-apartheid government to restructure and transform the legacy of apartheid education and training in South Africa. I do not recount in detail precisely how all of these policies and discourses of transformation came to be promoted and accepted, but only refer to those which had a direct bearing on values education.

According to Kraak (1998) People's Education as a phenomenon of the 1980's was primarily a political movement which viewed the school classroom as a central site of struggle and which came to represent a radical alternative to that of Apartheid education. Kraak holds that People's Education became an educational pedagogy encompassing the development of critical thinking, inter-disciplinary curriculum content, learner-centredness, participatory teaching methods, community involvement and a concern to link the focus of formal education with the world of work. Kraak points out that further development of these ideas did not take place with the dawn of the negotiations era but ironically, the radical language and populist appeal of People's Education has been resurrected to give legitimacy to what is essentially a conservative and technicist unit standards-based assessment technology-OBE (Kraak, 1998).

Proposals for restructuring first emerged during the period that led up to the 1994 elections. Following intense debate between the African National Congress (ANC), the Congress of South African Trade Unions (COSATU), private sector groups and community groups, an education and training agenda was drawn up, borrowing from a range of international experience (see Jansen, 1997; Fataar, 2001; Jansen & Christie, 1999). An integrated approach to education and training attempts to marry two related but different worlds; the world of education and the world of industrial training that have widely been seen as separate from each other. An important aim of the policy reform in the post-apartheid era was to unite education and training into an integrated system.

The “integration agenda” as Christie (1997: 117) refers to it, aimed to integrate the separate qualification opportunities offered by formal and non-formal education that were widely seen as the cause of unequal opportunity in the workplace. The main objective of the integrated system was seen as an attempt to eliminate artificial divisions and blur the distinctions between mental and manual labour by means of a centralised qualifications grid: The National Qualifications Framework (NQF). This grid was premised on a single reductive “conceptual vocabulary for all modes of learning” as the Joint Departmental Consultation Document (DoE/ DoL 2003: 6-7) explains.

Fataar (2001) agrees that the integration of education and training became firmly embedded in curriculum discourse through the active lobbying of the trade union movement and as a result of a convergence of thinking by business, and the state in support of the integration of education and training.

The OBE discourse depended heavily on policy borrowing from different international contexts which is particularly apparent in the NQF’s approach to defining outcomes. Jansen and Christie (1999:9) note: “This shift in language (from competencies to outcomes) is a union-derived language for the workplace linked firmly to the NQF.” This view is supported by Fataar

(2001) who alerts us to the fact that the outcomes approach is an adaptation of a strong training discourse prevalent in Australia, which had considerable influence on the development of the integration of education and training debates and the development of OBE in South Africa. For example, the influence from Australia and New Zealand came via the active interaction between those countries' labour movements and COSATU (Christie 1997).

Objections to the integration of education and training came from various sources for example, as Taylor, (1985: 62-101) points out:

Administratively, (industrial) training has been linked with employment rather than education... fundamentally the separation reflects the way in which history, economic circumstances and social structures have given us a heritage of values, attitudes and assumptions that constitute education and training as two separate metaphors ...

Kraak, (1998: 21-58) in explaining the effects of integration of education and industrial training on knowledge holds:

... this formulation (integration) has the dramatic effect of collapsing ... all boundaries which historically have evolved around different forms of knowledge acquisition and knowledge organization, and which are intrinsically linked to specific institutional locales for example disciplinary knowledge in universities, institutionally-prescribed categories of knowledge as in the curriculum in schools and experiential knowledge in private enterprises.

The Committee of University Principals regarded the integration discourse as an attempt to stifle academic freedom by failing to:

... reconcile the differences between students with manual training, and those with formal academic training who are working towards the same qualification" (Greenstein, 1995: 8 quoted in Fataar 2001).

Harley and Wedekind cited in Chisholm (2004: 199) raises a different point of criticism and comment on educators' disengagement in the policy process of OBE and point out that:

The new curriculum did not emerge from debates within the educational sector about the most appropriate forms of pedagogy... or what was feasible in the profoundly diverse and unequal range of schools ... Teachers ... simply found themselves in a new curriculum world.

Despite various arguments against the integration of education and training and OBE notably by Taylor, Kraak, Jansen and Christie and Fataar, a policy of integration was adopted.

Kraak, (1998) and Lave and Wenger (1991) stress that generic competences are acquired in specific contexts; often referred to as communities of practice and as a consequence, are not always applicable in other knowledge or occupational contexts. They point out for example, that the critical thinking and problem solving skills that a brain surgeon and a mechanic acquire in their respective communities of practice, cannot easily be substituted one for the other or transferred to one another.

Jansen and Christie (1999) point out that there is a Tayloristic understanding in labour and industrial training where competence is understood as that worthy performance...for which someone is willing to pay. Other definitions of competence relate to “aspects of the job at which the person is competent” (Woodruffe, 1992:17). Jean-Francois Lyotard cited in Mason (1997:10) refers to competence in terms of “the performativity of knowledge.” This refers to demonstration of the use of knowledge which the curriculum seems to favour above the process of the acquisition of knowledge.

An analysis of the terminology employed in the curriculum demonstrates that concepts that have traditionally been associated with industrial training; such as observable behaviour, skills, outcomes, competence, performance indicators (although these have been removed from the curriculum) assessment- standards, measurement and checklists have been transferred from training to education. This implies that the process of integration had

been biased in favour of the industrial training and assessment model. In fact, Christie (1997) maintains that the concerns of training workers for occupational mobility trumped the pedagogical concerns of People's Education in the integration discourse. Jansen and Christie (1999:7) point out that "the sudden emergence of proposals (for OBE) brought ordinary teachers into contact with a curriculum discourse completely foreign to their understanding and practices."

As Degenhardt (1984: 232-252) in referring to the assessment of observable competences and measurement of moral concepts such as values explains;

Concern with observation, measurement and statistical method has been at the expense of reflection of *what* is being observed- on whether what is being so carefully measured *is* what it is *taken* to be...they blind themselves to the complex mixture of knowledge, feeling, judgement, habit and action that makes up moral life.

The danger of the integration of education and training and its "demonstrable competences" approach is that, what is distinctive and constitutive of education as a process which includes both the acquisition and application of diverse knowledges (cognitive and moral) may be underrated and marginalised.

## **2.9. CONCLUSION**

As was to be expected values education policy was influenced by a number of factors, one of which is political vision. Political vision has always influenced education in South Africa and in the past education became the conduit through which negative racist attitudes and undemocratic values were transferred to society through the hidden curriculum as Christie (1985) has explained. This led to the rejection of apartheid education as was evidenced by the Soweto uprisings of 1976 and resistance to apartheid education from various political organisations. Jansen (1995) holds that C2005 emerged as a political and not a pedagogical project and Harley and Wedekind cited in



Chisholm (2004:198) point out that “what makes C2005 distinctive in aligning itself to political values, is the explicit way in which it does this.” C2005 has also been described as a political strategy that is used to drive social transformation. This view is evident in a policy document Curriculum 2005 Lifelong Learning for the 21<sup>st</sup> Century (DoE 1997) which states that (C2005) will also foster learning which encompasses a culture of human rights, multilingualism and multi-culturalism and sensitivity to the values of reconciliation and nation building.

So political agendas have in the past, and presently, whether implicitly or explicitly, played a key role in the values that are embedded in the curriculum. It is fairly obvious that there are high expectations attached to values education to contribute to the vision of a morally just, democratic society, but it must be recognised that values education cannot change society on its own particularly as the complexities of values education have not as yet been fully explored. Curriculum assumptions regarding the integration of education and training have pedagogical and practical implications and create challenges for the teaching and assessment of values which have not been fully considered, recognised and addressed.

The curriculum is now a public issue and the values that it promotes are made explicit which is a positive development. But openness is only one dimension of the curriculum, for without research of how the curriculum is conceptualised and addressed by educators in classrooms, it will not be possible to determine the extent to which it has accomplished the political transformation and educational vision it was intended to accomplish. It should also be acknowledged that another hidden curriculum continues to operate in society.

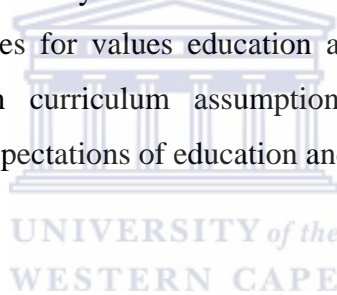
It is a curriculum that implicitly transmits different values to learners than those of the formal curriculum. Seemingly harmless activities such as “mix it” on cellular phones and unrestricted access to websites on the Internet exert

powerful influences on value formation of young people. Perhaps this is the new hidden curriculum that needs to be explored.

Gultig (2001:10) writes

... that if we are to intervene in the schooling process in order to foster moral learning and to improve its quality, to encourage its diversity, to expand and enrich its outcomes, to mediate and facilitate it, we need to develop our understanding of it.

Beck (1990: 143-150) in support of Gultig's view, agrees that there is a need to understand what values education entails, but also argues for a consideration of the importance of values education: "If we are to teach morality in schools we must not only understand what it is, but also be certain of its importance." Clearly there is a need for on-going conversations and the revisiting of policies for values education as it is apparent that there is a mismatch between curriculum assumptions and expectations, and the assumptions and expectations of education and training.



## **CHAPTER THREE**

### **VALUES EDUCATION UNPACKED: A PHILOSOPHICAL PERSPECTIVE**

#### **3.1 INTRODUCTION**

The central aim of this chapter is to explore how the concepts of values and values education can best be understood. Kohlberg (1963: 57-58) referring to the meaning of these concepts holds:

If I could not define virtue... then could I really offer advice as to the means by which virtue could be taught? Could it really be argued that the means for teaching obedience to authority are the same as the means for teaching freedom of moral opinion...? It appears, then, that either we must be totally silent about moral education or else speak to the nature of virtue.

I explore values education terminology and consider the relationship between values and virtues. Thereafter I unpack and discuss values priorities, the related meanings of values education, moral education and citizenship education. Finally I consider the nature of values knowledge as a means of gaining insight into the meaning of values education. I explore debates about values education internationally and locally to glean some understanding of the issues concerning values education that are raised in these debates.

#### **3.2 CONCEPTUAL ANALYSIS**

Conceptual analysis is the research tool used by philosophers when clarification is sought for the meanings that might be ascribed to concepts. It is therefore one possible means of gaining insight into how concepts such as values and values education can best be understood. I use conceptual analysis as a tool to bring into view the meanings of often unexamined assumptions about “values education” and “values” as these appear in the curriculum. Du Toit in de Vos, Strydom, Fouche & Delpont (2005:425) explains that:

... conceptual analysis is crucial for orientating oneself to one's chosen field of research... it is an attempt to become conversant with the basic tools of thinking and understanding: namely language, terms, ideas and concepts.

While conceptual analysis makes a valuable contribution to the interpretation of the meanings of concepts Flavell (1977: 1) points out that:

The really interesting concepts of this world have the nasty habit of avoiding our most determined attempts to pin them down ... Their meanings perversely remain multiple, ambiguous, imprecise and above all, unstable and open- open to argument and disagreement ...

### **3.2.1 VALUES EDUCATION TERMINOLOGY**

Conceptual analysis of the term values education reveals considerable differences of interpretation and understanding of what is subsumed under this term. But the umbrella term values education is commonly understood as having particular emphasis on civic and moral values (Halstead & Taylor, 1996). Values education is therefore very closely aligned to other terms being currently used in the literature including spiritual, moral, social and cultural education. Lickona (1991) and Halstead and Taylor (1996) refer to character education, education in virtues and the development of attitudes and personal qualities.

Veugelers (2000) points out that various terms are being used in the literature each with its own assumptions, epistemology and theoretical framework for values education. For instance, in the United Kingdom literature refers to: values education, character education, moral education, personal and social education, and citizenship education. In the debate about the task of the educational system in the United States there are many references to character education.

Research by Munn (1995) and Halstead and Taylor (1996) shows that scientific publications mostly refer to moral education but in the European

context the term civic education is commonly used in the literature. The South African Constitution (Act No 108 of 1996) refers to critical citizenship and democratic citizenship. Waghid (2004) has advocated the need for compassion and justice to inform citizenship education in South Africa. Waghid (2004: 44) believes that the notion of responsible citizenship needs to be extended and holds "... learners are educated to act responsibly...Yet this would not necessarily guarantee that learners would become morally just." The implication is that democratic citizenship entails more than just being responsible.

In this study the term values education is used to include and capture the following meanings subsumed under it: human rights education, citizenship education, moral education, values education which includes attitudes, dispositions and compassion, all of which have been identified in the moral education literature as candidates for values education efforts (See Ryan, 1989; Bennett, 1992; Kohlberg, 1971; and Nucci, 2001). Values education appropriately captures my understanding of values education as a collective, inclusive (both formal and informal) educative process.

### **3.2.2. VALUES AND VIRTUES**

The Collins English Dictionary (2004: 1795) defines values as "the moral principles or accepted standards of a person or group." Accepted standards may be good or bad, moral or immoral and this dictionary definition does not distinguish between these. So this definition seems inadequate as it fails to capture the true meaning of this concept. Values have also commonly been described as moral compasses by which to navigate the course of our daily interactions with members of society or as guides to action. Veugelers (2003: 379) explains that "values are judgements (decisions) based on a notion of what is good and bad; they refer to concepts of a "just life." Morrow (1989) suggests that instead of referring to values we could also refer to rules or

principles. This interpretation is favoured by Halstead and Taylor (1996:2) who hold that:

... values refer to the principles and fundamental convictions which act as general guides to behaviour, the standards by which particular actions are judged to be good or desirable.

Virtue is defined in the same dictionary as “any admirable quality or trait” (2004:1818). Needless to say people have different views on what constitutes admirable traits. In fact what some people consider to be admirable traits may not be moral at all. Such limited descriptions in my opinion, may be the result of looking for definitions of concepts instead of evaluating different interpretations of their meanings.

Green (2004a) in this regard has pointed out that the literature is vague in terms of an adequate description of the meaning of values as it does not provide a clear-cut and consistent distinction between values and virtues. This might imply that when people commonly use the term values they do not mean any values, but rather those values they consider to be important for democracy or becoming a good person. In other words they are inclined to mean positive or desirable values and this could refer to what is generally considered to be worth valuing. Values education therefore by implication, has a moral dimension. But the question that begs an answer is: are values and virtues the same?

Green (2004a) maintains that it seems reasonable to assume that when authors mention or identify democratic values, they are by implication also referring to associated virtues. I agree with Green’s view because, if tolerance and caring are considered desirable values, then it logically follows that non-violence and compassion would be some of the virtuous dispositions that a tolerant and compassionate person would value. It also follows that such a person will engage in acts of behaviour that mirror these values. This view is also held by Lipman (1996:1) who claims that: “...virtues are values, whether

they are matters of conviction, of disposition, or of action...” But not all writers agree that to associate values with virtues is rooted in a firm understanding of the distinction between their meanings.

Williams (1995) for example claims that there is a need to make a distinction between values and virtues. He points out that a common assumption may be that we simply have no need for “values” since the word is fully replaceable by less ambiguous and more forceful synonyms such as “virtues.” Williams argues that these words are not synonyms; for in his view, virtues refer to good habits, a disposition of the will towards goodness, while values refer to qualities of things or actions that make them desirable. Williams concedes that values and virtues often intersect, but claims that values cannot be reduced to virtues, as values extend beyond moral virtues and comprise all good for the person; biological, human, moral and spiritual. This view extends the meaning of the concept of values beyond dictionary definitions. Ryan and Bohlin (1989) draw attention to the fact that values can be good or bad and in view of this, values may therefore be, but are not necessarily, morally desirable. Therefore the meaning of values in this study refers to positive values and virtues which are morally desirable.

While there appears to be a lack of clarity regarding the distinction between values and virtues; and the relationship between values and virtues; it has become clear from the literature that there is some agreement on a relationship between values (virtues) and action or, as Williams (1995) has pointed out, between good habits and the values that make such habits probable. Oser (1996) holds that values are expressed through judgements (attitudes) and through forms of behaviour or action. Levy (1993:2) concurs with the view of Oser and understands values as: “preferences for a certain form of conduct” (But Veugelers and de Kat (1998: 379) challenge these views and draw our attention to the fact that knowing about values does not necessarily result in moral behaviour):

... research indicates that agreement about values at an abstract level between teachers often coincides with different interpretations at the level of the concrete actions of those teachers.

The implication is that understanding values is not the same as making judgements about values or acting in accordance with such decisions. While these explanations confirm a relationship between values and agency, it is not a causal relationship as understanding of values does not automatically cause moral action.

Values are sometimes regarded as, and confused with, social norms and traditions, but there is obviously a difference between these. Norms and traditions are social conventions that are based on values, but are strongly defined within a specific social or cultural context or in communities of practices. Some values, traditions, social norms and customs are clearly culture specific by definition and therefore may not necessarily be considered as moral by other cultures.

Berkowitz (1997) and Smith (1970) make a distinction between different types of values. Berkowitz claims that values such as honesty and obedience are regulative values, while justice and equity are social values, as their real meaning becomes evident in a social context. Kohlberg (1971) Ryan (1989) and Prencipe and Helwig (2002) point out that making a distinction between different types of values, is important in debates about values. They list the following categories; firstly, basic moral values or social values that reflect issues of justice and harm and have direct implications for the welfare of others; secondly, character values that are closely associated with individual character traits; thirdly, non-moral values that are sometimes identified as cultural values, for example industriousness; fourthly, politico-moral values that involve patriotism and citizenship and more abstract values such as democratic perspectives or beliefs; finally, religious values that pertain to particular belief systems.



A too narrow conception of values education may exclude other values that ought to form part of values education for example caring, compassion and justice as Waghid (2004) has suggested. The writers mentioned in the previous section all seem to agree that values may not be necessarily moral, but they are valued by individuals as strong preferences for certain qualities or dispositions, while virtues are generally considered to be moral; a disposition towards goodwill to others. So logically we should speak of virtues education, but we do not. Reference to different categories of values is useful as it serves to demonstrate the different dimensions of values, and this extends and enriches our understanding of the complex nature of values.

Veugelers (2003) for example identifies the following dimensions of values: person-oriented values; socially-oriented values; conformation or independence-oriented values; acceptance of values or critical reflection on values. Berkowitz (1996) refers to justice and human well-being as central values while Veugelers (2003) refers to these as moral values. In the Just Community Schools' approach, respect for others, care and social responsibility are regarded as central (common) values according to Power, Higgins and Kohlberg (1989) while Smith (1970) suggests that these are to be understood as basic values. Values relating to order and structure in work and behaviour, the development of self-discipline and autonomy, empathy and learning to deal with criticism are generally referred to as regulative values. Berkowitz (1997) refers to such values as meta-moral characteristics.

Power, Higgins and Kohlberg (1989) affirm that values such as care, trust, collective responsibility and participation are central (common) values. Personal values refer to positive values such as respect, honesty, cleanliness, obedience and diligence and are usually of an individualistic nature. I am aware of the fact that not all values can be seen to be morally good. I am also aware that different writers have identified different categories of values such as common, personal, individual, basic, central or social. A moral value, as I

understand it transcends the hierarchy of values as it is more than just a belief; it constitutes a worthiness of a norm or principle embedded in a person, a group or a belief system which provides positive structure and order to their social reality.

In this study I understand values in terms of Kohlberg's interpretation as "making decisions which are moral and acting in accordance with them" (Kohlberg 1964: 425). I will also refer to personal and common values. My use of the term personal values will refer to positive, desirable values and morals that individuals possess; while common values will be used in reference to positive democratic values related to the notion of the common good of a society.

### **3.2.3 VALUES AND MORAL EDUCATION**

Warnock (1967:75) makes a strong plea for investigation and clarification of the concept moral. She maintains, (and I strongly agree with her) "that if we do not understand the meaning of concepts, how do we know what the phenomena are which moral theory is to deal with?" Nucci (2004) supports the notion of clarifying morality, as she maintains that we cannot know about methods and means of teaching and learning in the absence of knowledge about the substance and essence of that which is taught and learned. Nucci argues that too often the stated aim of moral education is for children to be good with only vague conceptions and indications of what it means to be good.

Much effort has been spent on attempts to define morality in the form of a set of fundamental principles or definitions. Such attempts to give a firm foundation to what morality means have not successfully resolved the question, but they have given rise to a variety of accounts of morality which in some way or another, have informed our understanding of the nature of this concept. The meaning of the concept moral is as complex as the meaning

of values so it is neither self-evident nor transparent. Judging from the way this concept is used in the literature it seems that it could refer to a number of possibilities; actions, motives, dispositions, reasoning, or to the consequences of people's actions. Goodman (1998) agrees with this view and holds that the distinction between what falls in and out of the moral domain, what is moral and what is merely conventional, what is obligatory or just preferred, is unclear and often arbitrary.

It appears that our common use of the word moral does not clearly articulate its meaning, which indicates that different meanings may be borne by it. Haydon (1987) similarly recognises that it is difficult to define morality in the form of a fundamental principle or a set of principles, but asserts that one of the most important facts about morality is its concrete social reality. He explains that morality is embedded not just in the ideas and choices of individuals, but in the daily lives of people and in their social practices. He believes that without a certain moral background, or social tradition, there could be no such thing as the rational, autonomous moral agent. Haydon holds that the fact that some questions are considered to be moral questions for some individuals, but not for others, cannot be explained without reference to a moral tradition of thought and practice within which the individual had been socialised and learnt to think.

Birch and Rasmussen (1989) consulted the discipline of etymology to seek clarification of what the term moral means. Their research has traced the meaning of moral to the word ethics and has revealed that ethics has a Greek root, the noun form of which is *tō ethōs*. *Eiōtha* is the Greek form of ethics which means "to be accustomed to." The Latin equivalent is *mōs* from which we have derived words such as moral, morality and morale. *To ethōs* originally referred to the shelter for animals like a stall which provided security, stability and sustenance. One of the oldest interpretations of morality from the Greek tradition is translated as behaviour according to custom. The rationale here was that customary behaviour (according to the

rules, norms, traditions and social conventions of society) is moral behaviour as it provides guidelines for the kind of behaviour that is sanctioned in a stable non-pluralistic society. So, originally it referred to a shared understanding of what was considered to be moral and what was socially agreed on.

Birch and Rasmussen (1989) provide us with some distinctions that are extremely illuminating in understanding terms which we commonly associate with morality. Firstly, that moral and non-moral distinguishes human from other life forms, for example plants and animals. Their reasoning is that morality is based on a consideration of what plants lack and humans possess: the awareness of a difference between “is” and “ought.” Plants can be seen as having a distinctive form of life, but they do not have the capacity of moral vision; and therefore cannot conceptualise or create a better world. Dolphins and elephants do exhibit love, nurturing and group loyalty, all of which in a sense are aspects of the moral life but they lack moral vision.

Furthermore the distinction between moral and non-moral also has to do with semantics: the fact that words which we often associate with moral matters can have non-moral meanings as well. Good and bad; right and wrong, are some of the terms that we usually associate with the evaluation of morality. In some ways moral terms are often disengaged from their contexts and confused with evaluation although the intention is not to evaluate morality. For example, if I evaluate a student’s essay and commended it as a good essay; good in this instance refers more to the academic capacities, literary abilities and the right technical execution of details such as sentence construction and referencing, than to the character of the student.

This is a crucial distinction that has particular significance for this study as it demonstrates that judgment of character is different, but can be confused with judgment of academic capacities, social skills or technical skills when evaluative terms such as good and bad are used as assessment criteria.

As Birch and Rasmussen (1989: 36) explain

Moral consciousness resides in the distinction of is from ought and that it has to do with the capacity of humans to discern and choose what is right over wrong, to seek a better world or envision a transformed society.

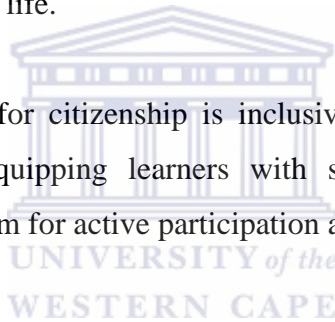
So while humans may have a social agreement of what morality is or ought to be, they have a choice in acting in accordance to what is moral. Seen from this perspective what is moral refers to understanding the difference between a present situation (what is) and a future one (what ought or could be) and involves choice. Sigelman and Shaffer (1995) concur with this idea and maintain that the term morality implies the ability to make a distinction between right and wrong, to act accordingly and to experience pride for the correct choices and shame for the wrong ones.

Another perspective of the meaning of moral is to distinguish between different ways of understanding practices in societies. Practices in societies can be described and defined from a variety of ways of understanding or perspectives; the social; legal; religious; economic, moral and political. But can one perspective be similar to another? Understanding abortion from a legal perspective is different from understanding it from a moral perspective; therefore legal and moral perspectives often do not converge. To describe society in terms of a concern and compassion for the welfare of human beings is not necessarily to describe it from the legal, political or economic perspective. It is to describe it from a perspective that is linked to a disposition of goodwill, caring, compassion and concern for the well-being of others, all of which are typically moral considerations. So the moral point of view establishes the reference point or boundaries for elements of the moral life as it provides the framework for what is to be included and excluded in a discussion of the moral life.

### 3.2.4. VALUES AND CITIZENSHIP EDUCATION

Kerr (1999) in referring to citizenship makes a distinction between three approaches to citizenship education: education about citizenship, citizenship through citizenship and education for citizenship. Kerr explains that:

- Education about citizenship involves and incorporates gaining understanding of national history and the governing structures and constitutional processes of civil society.
- Citizenship through education is a more inter-active “hands on” approach and includes participation and involvement in school and community life.
- Education for citizenship is inclusive of both approaches but also includes equipping learners with skills, attitudes and values to prepare them for active participation and responsible citizenship.



Gutmann and Thompson (1996) refer to active citizenship while Walters (1999) mention critical citizenship. Mitchell (2003) refers to reflexive and participative citizenship. Waghid (2004) points to different uses of the term citizenship that have become embedded in educational discourses through the introduction of concepts such as democratic citizenship. He maintains that South African educational discourse has tended to fuse many aspects of citizenship in its Values, Education and Democracy initiative. While the writer generally supports the idea of citizenship education, he argues that citizenship education in South Africa is guided by liberal and communitarian concepts of citizenship, and that this liberal-communitarian concept of citizenship is not sufficient on its own to bring about educational transformation in institutions. Referring to the question of values Waghid (2004: 535) holds that:

Whereas the South African programme...highlights the importance of teaching pupils to become democratic, *socially just* individuals...it does not mention the necessity for pupils to become trustworthy, generous and compassionate: *morally just* individuals.

Waghid points out that, citizenship education in South Africa also needs to promote a sense of compassion; motivating learners to take seriously the suffering of others, as the stability of modern democracies depends not only on the justice of their institutions, but also on the quality and attitude of their citizens. He therefore believes that the concept of compassionate citizenship ought to be included in our understanding of democratic citizenship. Veugelers (2003) has suggested that the notion of a just life should inform citizenship education

Racial barriers, national barriers and social barriers cause damage to all people. A society with caring and compassion as its central values is one that challenges and dismantles barriers that have historically been erected and tolerated. Current concerns such as the HIV and AIDS pandemic, poverty, crime, abortion, child prostitution, human trafficking, and road rage affect both the private and public lives of citizens. The recent incidences of Xenophobia brought Waghid's notion of compassionate citizenship into sharp focus.

What was at issue, in this case, was to make a decision between compassion for the unfortunate displaced victims, or indifference to their plight, in other words making morally just decisions. Judging from the views about these incidences expressed in the local media, it seems that for some reason, compassion is more readily extended to victims of natural disasters (floods, hurricanes, tsunamis and famine) than to victims of political disasters (wars, and displaced people).

Kymlicka (1999: 88) in support of Waghid (2004) is quoted as saying:

... citizenship education is not simply a matter of knowledge of political and constitutional institutions. It is also a matter of how we think about and behave towards others.”

Harley and Wedekind (2004:195) referring to the new curriculum maintain that, “its new mission would be that of uniting all citizens as equals in a democratic and prosperous South Africa.” What these views illustrate is that values such as compassion, caring, and the common good are essential for genuine educational transformation. This should alert us to the fact that there ought to be a moral dimension to citizenship education. Furthermore, these views signal that values education could not only potentially extend beyond citizenship education, as it is commonly understood, but that it ought to.

In conclusion, while I take on board and support the notion of compassionate citizenship as explained by the writers above, I want to sound a note of caution. The crisis relief centre of a local church provided shelter in the hall for 30 victims (that had been identified by its members) of the recent Xenophobic attacks. Within a day the numbers had grown beyond what the relief centre could accommodate as victims flocked to the hall demanding shelter. The point is that learners should be taught to value compassion for what it is: an act of goodwill which is extended by caring human beings to others in need and it should therefore not be tainted by notions of entitlement.

### **3.3 EXPECTATIONS OF VALUES EDUCATION**

According to Veugelers (2001) critical-democratic citizens are not mere participants, but they also take responsibility for the functioning of society. Judging from the aims of the Constitution of South Africa and the selection of personal and common values in the Manifesto, it is reasonable to deduce that there is an expectation that educational policies in South Africa will support the development of critical democratic citizens. The kind of learner that is envisaged is described in policy documents as one who is imbued with democratic values and acts in the interests of society, based on respect for



democracy, equality, human dignity, life and social justice. (Report of the Review Committee on C2005, DoE, 2000)

It is clear that it is expected that the inclusion of personal and common values in the curriculum will result in learners who are bearers of both rights and responsibilities. Veugelers (2001) contends that a multicultural society places specific demands on a critical-democratic citizenship. For, in terms of values education policies, young people are expected to develop their own identities and at the same time, they must be prepared to actively participate in societal life and respect differences in identities.

Gutmann's (1990: 2) observation that "these tensions between individual freedom and civic virtue pose a challenge for education in every pluralistic society" sums up the challenge facing values education in other countries and in South Africa.

### **3.4 THE NATURE OF VALUES KNOWLEDGE**

Assuming then that there is a role for schools, what philosophical understanding of knowledge, and particularly knowledge about values and morals can best guide the practice of values education? Ryle (1971) developed an epistemological framework for the classification of knowledge which has made an important contribution to general theories of learning and teaching. It provides an illuminating framework for answering the question of how to distinguish between different categories of knowledge. I prefer this framework for three reasons: firstly, it acknowledges that values constitute a different kind of knowledge from other categories of knowledge; secondly, it provides a helpful classification of knowledge; and thirdly it provides a practical way of relating to the categories of knowledge proposed in the curriculum. Ryle (1971) distinguishes between three kinds of knowledge: *knowing about* which is associated with factual or content knowledge; *knowing how to*, which refers to skills or operational knowledge, and

*knowing to be*, which refers to acting in accordance with positive values, dispositions and attitudes in short, acting morally. More recently Mason (1997) based on the framework provided by Ryle, makes a similar distinction between categories of knowledge, but refers to propositional, procedural and dispositional knowledge.

If this framework is applied to values education it could mean for example, knowing about values; such as social norms or conventions; knowing ways of behaviour and then having a disposition towards acting in accordance with accepted social and moral norms. Ryle claims that for the latter kind of knowing, one needs to know “how to go on in the same way” as a conscious act of will. According to Ryle this is learnt through example (modelling), training (discipline) and understanding (cognition). An important point that Ryle demonstrates is that while there are methods of teaching and learning “that” and “how to” we need a different approach for knowing how “to be.” What Ryle suggests is that moral learning is informed by both of these categories as well as the will to act accordingly, as each of these categories of knowledge is necessary for moral learning. For example in a lesson on natural resources in environmental education one could address:

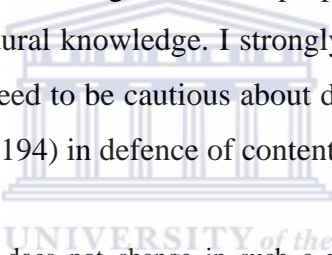
- a) The state of water resources
- b) How to save water
- c) The will to act in accordance with (b)

If the same principle is applied to values education:

- a) Knowing what respect is
- b) Knowing how to behave with respect towards others
- c) Being respectful

There is a general assumption among many educators that outcomes based education prioritises procedural knowledge. The central argument appears to

be that one ideology, academic competence, is being replaced with another ideology, operational competence. Gultig (2002:115) supports this argument and explains: “This focus on demonstrated, visible performance has the effect of emphasizing procedural knowledge at the expense of propositional knowledge.” The assumptions and argument is based on the fact that learning outcomes should be stated in terms of outwardly observable performance. The notion that teaching should primarily be focussed on demonstrable competences that could be assessed against clearly-set criteria of performance, on the one hand signalled a welcome shift from the overemphasis on the transmission of facts and rote learning. But on the other hand, the emphasis on procedural knowledge has left many teachers confused and uncertain about the relevance of propositional knowledge to the extent that some teachers no longer believe propositional knowledge to be as important as procedural knowledge. I strongly agree with Gultig (2002) who maintains that we need to be cautious about disregarding content knowledge. Hemson (1996:192-194) in defence of content knowledge argues that:



... knowledge does not change in such a way as to make all previous knowledge irrelevant...What has changed with the rapid development of knowledge is a greater understanding that educators cannot achieve a command over such a wide range of content as in the past.

Gultig regards content knowledge as being as important as procedural knowledge and while theorists like Ryle and Mason seem to emphasise procedural knowledge this does not imply that they regard content knowledge as unimportant. Mason (1997:10) explains the emphasis on procedural knowledge and reminds us that: “The intellectual currents of the day stress what Jean-Francois Lyotard, the French philosopher of post-modernism, called the performativity of knowledge in other words of what practical use is your knowledge, or what can it do?”

The question that now arises is not whether propositional or procedural knowledge should be prioritised, but whether these categories of knowledge

are in themselves sufficient to hold us accountable for how knowledge is used? Accountability for the use of knowledge points to a moral dimension; a category of knowledge that should not only terminate in the acquisition of knowledge, or consist of knowing how to execute procedures, but the application of knowledge which should facilitate the development of accountability and caring for the ends to which knowledge is used. This knowledge integrates thinking, doing and feeling. Mason (1997) refers to this category as dispositional knowledge. For example a learner may become a brilliant physicist, but this kind of knowledge does not have the capacity by itself to make her want to care that her knowledge is used in morally correct ways and not to manufacture bombs to inflict harm on humanity. Mason (1997) agrees with this and maintains that: “The learning of propositional and procedural knowledge without a firm grounding in a set of shared values (moral learning) creates unthinking technocrats.” Technocratic rationality or instrumental rationality limits itself to questions on how to do it rather than questioning why it should be done (Morrow 2001). Gibson (1986:1-19) has described technocratic rationality as “a kind of intellectual activity which actually results in the decline of reason itself and it therefore stultifies, distorts and limits individual and social growth.”

There is a common misconception that tends to equate knowing that or knowing how to with knowing to be. In values education the task of the teacher is not only to acquaint learners with bits of theory as Peters (1973) has argued, or content knowledge about the predominant values and morals of society and how to behave. It must extend beyond that and culminate in moral conduct (wanting to be) if it wants to qualify as values education. Following Ryle, values education is not just about simply helping children to know what is considered right and what to do. It is also encouraging them to want to act in accordance with what is right; which means providing them with opportunities and tools (skills) to practice making moral decisions and acting morally when confronted with a moral decision (Ryle, 1971). So, what Ryle seems to be suggesting, is that learners should also be taught how to live

values, as no amount of moralising on what to do will necessarily result in learners being moral. After all learners are not human doings but human beings.

It is evident that moral learning is a different kind of learning which requires much more than merely telling learners what to do or knowing what to do. It also includes the will to do. It is often mistakenly assumed that the intellect is educable, but that the will is not. But if our wills were not educable we would never want better food or better education or better communities. The theory that the human will is uneducable, flies in the face of the fact that people do have the will to desire more knowingly, intelligently and reasonably (Gibson, 1986). So if we accept that individuals have a free will when it comes to making value choices, one of the aims of values education as I see it, is to educate the will of learners to make good moral decisions and choices.

The frameworks provided by Ryle (1971) and Mason (1997) are by no means perfect as it is common knowledge that it is not always possible to make such neat, precise distinctions between different categories of knowledge particularly in respect of values as values are informed by all three categories. But these frameworks are illuminating as they make visible the taken-for-granted and seemingly unexamined view that is embedded in the curriculum that all categories of knowledge are the same.

Ryle's theory correctly suggests that the processes through which different kinds of knowing occur are far more complex than can be addressed by merely providing educators with a curriculum based on specific outcomes, assessment standards and assessment codes which uncritically assume that such requirements can be applicable to all forms of knowledge, teaching, learning and assessment.

### **3.5 VALUE PRIORITIES IN EDUCATION**

The most profound challenge that values education in democracies has to confront is how to reconcile freedom to choose personal values with commitment to common democratic values (Forster, 2001). For while members of a democratic society value their individual freedom of choice in respect of values and beliefs that they hold, they should also value a society where there is adherence to a common consensus of what constitutes the moral good. Waghid (2004:528) agrees with this view and maintains that “individuals cannot simply pursue their own self-interest without regard for the common good.” Certain values have been prioritised for inclusion in the curriculum, but there as yet seems to be no common agreement about which values should be given priority in schools and for what reasons. The Chair of the Curriculum 2005 Review Committee, Linda Chisholm, criticised C2005 for more or less the same reason: ... “It also does not provide a strong enough statement about which values the curriculum promotes and which it does not promote” (Gevisser & Morris, 2002: 197-219).

#### **3.5.1 INTERNATIONAL DEBATES ON VALUES PRIORITIES**

The question that begs an answer is should we prioritise personal values over common values? If so, which values and for what reasons? The literature indicates that some communitarian writers give priority to teaching what Njabula Ndebele at the Saamtrek Conference (2001) referred to as “the ties that bind”; those common values that provide social cohesion and unite citizens in their pursuit of a common good. But Gutmann (1990:3) challenges this communitarian view and maintains that “societies united by a common good have without exception been repressive and discriminatory.” She cites as an example that perceptions of the common good of the New England Puritans of seventeenth -century Salem, commanded them to hunt witches. Closer to home in South Africa, a perception of the common good of society

in terms of racial separation policies of the National Party (1948), led to the repressive social policy of Apartheid.

The literature indicates that writers generally maintain that education must remain neutral amongst different conceptions of the good life. Ackerman (1980:139) asserts a more individualistic conception of education and postulates that “a system of liberal education provides children with a sense of the very different lives that could be theirs.” Brighouse (1998) supports this view and reminds us that a key feature of public education in a liberal democratic society is that it does not impose or prescribe an exclusive conception of the good life on its future citizens, but that it rather equips them to define and shape the good life for themselves. Rorty (1990a) concurs with the views of Ackerman and Brighouse and asserts that the role of schools is to create literate citizens and independent thinkers who can distinguish right from wrong for themselves. Lipman (1961) supports this view and agrees that this is to be considered the most important mandate of schools.

It appears that we stand at an educational impasse. We must either teach learners personal autonomy, so that they are free to choose the good life among the widest range of options available for themselves, because freedom of choice is paramount. Alternatively, we should teach them to become good citizens because common civic values are the paramount good. The notion of personal autonomy provides the basis for freedom in democracies and it is generally agreed that all persons have the right to autonomy. Strike (1982) points out that autonomy is a complex term and that it fundamentally consists of three components. Firstly, psychological freedom; this is the capacity for independent choice. Secondly, the right to self-determination; this means the right to choose one’s own beliefs and lifestyle. Finally, persons have the right to participate in collective choices. Strike points out that these are pre-requisites for responsible choice and that a person who is not free in these ways cannot act or choose autonomously. But what does autonomy mean in respect of the rights of citizens in a democratic society? Fundamentally it

means that all people have a *prima facie* right to be self-governing, which indicates that the right to autonomy is rooted in the notion of agency.

Seen from Strike's perspective citizens must be capacitated to access (interpret, judge and apply) information and evidence in an intelligent way. This refers to the development of those cognitive abilities that enable the capacity for rational choice and decision-making. We cannot assume that sound moral judgement will develop without the cognitive skills and dispositions to be able to evaluate situations in an informed way, to choose options responsibly and then to act in accordance with those decisions. The objective of values education from this perspective should be to create opportunities for intelligent deliberation as Waghid (2004) refers to it, about moral issues and social problems in order to provide learners with relevant tools to exercise their right to autonomy intelligently and responsibly (Lipman, 1961). The implication is that morality is not only a matter of intelligent reasoning or thinking about moral issues. For if one only thinks about what ought to be done, but does not do it, there is a perfectly clear sense in which one has not solved the problem. It is the actual doing that solves the problem, not the answer you have in your head. This looks like one of the more promising roles for values education.

The question that remains unanswered is should schools prioritise personal or common values? It seems that the most common ethical stance adopted by educators in various countries especially those of democracies, was consensus pluralism. This position is justified on the premise that democracies provide freedom of choice to individuals. But the danger of this position is that, in the absence of a common moral compass a situation of moral relativism may arise.

The literature indicates a tendency to formulate objectives in education as dichotomies; in this case, personal or common values. Dewey (1964) strongly objects to this tendency and points out that it creates tension when



distinctions are made in terms of personal and common values, facts and values; freedom and discipline and freedom and truth. He cites the example of practices relating to freedom and discipline in schools and locates this debate within the larger debate of “child-centred” or “subject-centred” approaches to pedagogy. The problem is that these approaches are presented as being incompatible with each other, as if they cannot be held in tandem. Dewey (1964:255-259) resolves this tension by redefining and reconstructing the freedom- discipline debate: he links discipline to freedom in the following way:

The discipline that is identical with trained power is also identical with freedom. For freedom is power to act and to execute independent of external guidance. It signifies mastery ... emancipated from the leading strings of others ...

In this way both freedom and discipline become necessary, for a balanced approach to freedom. Gutmann (1990:5) also argues that this debate between personal and common values need not be constructed as a dichotomy and points out that the “the ideal of democratic education denies the validity of the dichotomy between individual and common values.” She argues in favour of schools promoting values and claims that we can make some progress towards relieving the tension between personal and common values if we develop a more democratic ideal for education.

Rorty (1990a: 44-47) points out that we should not ignore the fact that the word (values) education covers two entirely distinct, but equally necessary processes; socialization and individuation. The interesting question is: which values should be given priority during these processes? I think the answer lies in understanding the nature of these processes. The meaning of “socialization” according to the Collins English Dictionary (2004:1543) is “to prepare for life in society.” In some African societies this preparation is done through *esuthwini*; an initiation process which resembles the idea of an apprenticeship for young males. The aim of this apprenticeship is conscious

social reproduction, to induct the immature into the history, social constructs, norms, values, traditions and customs of their societies.

Dewey (1966) believes that socialisation is the shaping of an animal into a human being, followed (with luck) by the self-individuation and self-creation of that human being through his/her later revolt against that very process. So, for Dewey who had a significant influence on Rorty's ideas, primary education will always be in part, a process of socialising the young into the received ideas of the society. Dewey claims that;

Society exists through a process of transmission quite as much as biological life. This transmission occurs by means of communication of habits of doing, ways of thinking and feeling from the older to the younger. Without this communication of ideals, hopes, expectations and opinions from those members of society who are passing out of the group to those who are coming into it, social life could not survive (Dewey 1966: 3).

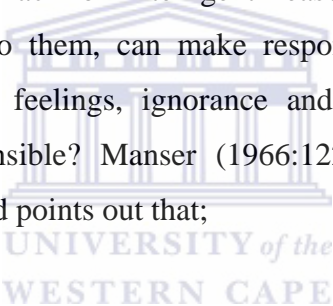
Dewey believes that higher education is a matter of inciting doubt and stimulating the imagination, thereby challenging and removing the barriers that socialization inevitably imposes.

So for Dewey (1966) and Rorty (1990) the teaching of common values should precede the teaching of personal values; meaning that socialization should come before individuation. Rorty (1990:45) explains: "education up to the age of 17 or 19 is mostly a matter of socialization; of getting students to take over the moral and political common sense of the society as it is ...." Dewey (1966) claims that it can never be the function of lower education to challenge prevalent ideas of what in a society is held to be true. Mitchley (1991:45) in agreement with Rorty and Dewey notes: "Children must take what society can give them and learn how it works before they can hope to change it."

Sartre's (1956) view of freedom seems to hinge on what is currently perceived to be a post-modernistic or moral relativistic view. On this view

values and moral standards are seen to be a matter of opinion for, according to this view, there is no absolute truth, meaning or certainty as to what values and moral standards ought to be. Sartre strangely believes in moral equality between a child and a grown adult and views them as moral equals. Based on this belief, he argues that both can define and choose the good life for themselves. His contention is that what all individuals have in common is that they have the freedom to choose; and choice is freedom and freedom choice. He is quoted as saying, “Man does not exist in order to be free, subsequently, there is no difference between the being of man and his being free” (Sartre, 1956: 25).

The difficulty as I see it is to explain how children with their initial limited understanding and lack of intelligent reasoning and discernment of the choices available to them, can make responsible choices. Surely choices based on impulse, feelings, ignorance and lack of certainty, cannot be regarded as responsible? Manser (1966:122) is equally unconvinced of Sartre’s position and points out that;



It would seem that little remains of the freedom that Sartre has emphasised... it is hard to see how an infant can be aware of what he is doing, and if not, then it is odd, even irresponsible, (my emphasis) to call him responsible.

Even the legal system acknowledges that youth cannot always be held responsible for the consequences of their actions and therefore age restrictions are imposed on obtaining a driver’s licence and what constitutes statutory rape.

The logical question then is: at what stage should learners be taught to be critical about the received ideas of society? According to Bak (2004:45) “critical discussion of the accepted rules, norms and values can begin at primary school level.” The primary aim of the process of socialization should be to provide novices with tools (concepts related to ways of knowing) that

will enable learners to identify the boundaries of the range of options that are available to them in order to make informed choices about what constitutes the moral life. In other words these tools should function to guide and deepen perceptions which will generate critical discussions about society in the individuation stage. Bak (2004: 44) posits that it is through communication of the things people hold in common that communal life is possible. In this way the processes of socialisation and individuation become linked. Those members of society whom Green (2001: 84) and other writers have referred to as “more knowledgeable others” all contribute in one way or another to extend this process of socialization until it culminates in individuation.

Seen from Rorty’s perspective, learners do not automatically have unlimited freedom of personal choice of values, but that their freedom necessarily ought to be constrained by their ability to make rational choices about values. Therefore Rorty maintains that “freedom cannot begin before some constraints have been imposed” (1990: 46). So Rorty and Dewey seem to hold views that accord with Piagetian thinking of stages of cognitive development while Bak and Lipman seem to think that we do not have to wait for adolescence if we make the input of values relevant.

Morrow (1989: 117) commenting on the socialization process points out that:

...immature human beings are dependent not only for their very survival, but also for their development into rational beings on the benevolent actions of the more mature beings amongst whom they live.

A crucial matter to note, here, is that immature beings cannot appreciate, at least not till after the event, the nature, and value of benevolent actions such as values education. As explained by Rorty and Dewey the process of socialisation needs the imposition of boundaries and this by implication means that socialisation is of necessity an undemocratic process.

Bak (2004: 45) agrees that the socialisation process is undemocratic and argues that it would be inappropriate to apply basic democratic principles such as equality and autonomy to the socialisation process of education. Following Harré (1999) Bak makes a distinction between “thin” and “thick” democracy and concludes that the socialisation process of education is necessarily characterised by “thin” democracy. Strike (1982) does not seem to support Bak’s view of thin democracy in the socialisation process only as he holds that democracy in educational affairs is governance by the incompetent. This seems to suggest that for Strike education in general should be undemocratic as he believes that learners are incompetent to be self governing when it comes to education. Seen from this perspective there is a need for education, in democracies, particularly in South Africa, to question whether the perceived strong focus on the democratic rights of learners is sacrificing morality for the sake of democracy.

As mentioned in the previous chapter, the founding document for policies aimed at the introduction of values education in South African schools; the Manifesto on Values Education and Democracy (Department of Education, 2001) professes that there is “no intention to impose values.” This view reflects a limited understanding of what is constitutive of values acquisition in the different processes of education as explained by Rorty (1990); Dewey (1966); Strike (1982) and Bak (2004).

In summary, if Gutmann, Rorty, Dewey, Bak and other writers who support the view that socialisation should precede individuation are correct, then the pedagogical implications for schools in democracies are clear; to firstly cultivate common values and set boundaries to human rights through a process of socialisation, and then, through the process of individuation prepare learners for meaningful life as thinking democratic citizens. If we take on board the insights of these writers then South Africa’s moral and political commonsense in respect of the process of socialising the youth into a culture of human rights seems to need revision and re-thinking in many

ways. It appears that there may be some truth in the general perception among educators that the government places too much emphasis on the rights of learners and that there is a need to set boundaries to these. The challenge for values education in South Africa therefore is, firstly to socialise learners into the common values of a democratic society such as caring, compassion, respect and honesty and then during the individuation phase, to find a balance between personal and common values as both are necessary, for the development of thinking, democratic citizens.

### **3.5.2 THE LOCAL DEBATE ON VALUES EDUCATION**

Delegates at the Saamtrek Conference on Values, Education and Democracy held in South Africa in (DoE, 2001), did not reach consensus on the question of whether values can be taught. Morrow with regards to this maintained that "...values could not be taught in a classroom but emerge gradually if at all, out of community life..." (DoE, 2001:13). Some educators argue that schools cannot take on the responsibility of inculcating values in learners as this is considered to be the responsibility of parents. There are also those who believe that values education requires a collective effort from all members of society as values are socially constructed. Ex-President Mandela supported this view and maintained that "... one of the most powerful ways of children and young adults acquiring values is to see individuals they admire and respect exemplify those values in their own being and conduct (Values, Education and Democracy DoE, 2001:13). Justice O' Regan maintained that values cannot be asserted or taught in any direct fashion, but are assimilated and adopted and that the manner in which we teach probably does more to instil values than the subject matter that we teach.

Hindle at the same conference remained sceptical about the role of education in the teaching of values and maintained that the whole issue of character building is the responsibility of institutions in society; the home, the family, the church and schools. Nolan, responding to a question on the legislation of

values agreed that a government must make laws and impose them in order to protect society, but he argued that this is not how you educate people in the spontaneous adoption of moral values. He believed that the adoption of moral values requires a change of consciousness; something that education can do. Reardon (1995, 1997) in support of Nolan (1995; 1997) emphasised the need for values to centrally inform human rights education. Her thesis is that the moral dimensions of human rights are central to an appreciation of human rights, and that education in and of values is crucial for the preservation and development of human rights, including those in schools.

What these opposing views indicate is that the question of values education is complex and seems to entail more than policy by declaration or the setting up of a moral agenda for teachers to teach. Kallaway (2007) points out that policies which neglect teachers' insights are not going to work and external managerial solutions are deeply damaging to schools, teachers and students. This seems to be the approach that the Manifesto has favoured. Kohlberg (1971) criticized such approaches on the grounds that they project and endorse a "bag of virtues" approach to morality which in his view often does not accomplish much in changing the mindsets, decisions and actions of people.

### **3.6 CONCLUSION**

Much of the present complexity and uncertainty, in respect of values education, seems to stem from a flawed conceptual understanding of the nature of values knowledge. Therefore we might conclude that learners who have knowledge about values but no experience of making informed choices and lack personal capacity to reason about moral issues intelligently, are likely to act less morally if only just from ignorance or failure to consider different possibilities.

This chapter has revealed that values and values education is a distinctive category of knowledge. It is distinct from knowledge and skills, but is also inclusive of it. It appears that the complex nature of values knowledge is not always known, considered and acknowledged by curriculum designers. This chapter has revealed that there is a moral dimension to citizenship education and that unless the link between values, moral education and citizenship education is taken into account, impoverished versions of citizenship education will result.

An important conclusion drawn from this chapter is the need for further ongoing discussion and deliberation about values education. The need for a coherent policy for values education has often been expressed and the current policy has been identified as a concern. What has emerged from this chapter is that there are many aspects relating to values education that first need to be resolved. I believe that the resolution of these is a pre-condition for a coherent policy for values education.

In the following chapter I will explore the teaching of values showing that depending on how values knowledge is conceptualised, there are different possibilities in respect of content, process and assessment.



## **CHAPTER FOUR**

### **THE TEACHING OF VALUES**

#### **4.1 INTRODUCTION**

Different kinds of knowledge exist in any society: lay knowledge, experiential knowledge, tacit knowledge and intuition all of which influence value preferences and values acquisition of individuals in one way or another through their everyday experiences. As a result of this, different perspectives about the acquisition of values abound in society, for instance, that values are ‘caught rather than taught.’ But it appears that understanding the need for racial and religious tolerance, the need to respect the suffering of the less fortunate, or the details of other peoples’ cultures and point of view, are types of knowledge that educators and especially learners do not ‘catch or pick up’ through everyday experiences (Beck, 1990).

In this chapter I explore the major theoretical approaches, as suggested in the literature, to the teaching of values. Thereafter, I refer briefly to the classroom strategies most frequently mentioned in the literature and then turn to research evidence regarding educators’ perceptions of their role in the teaching of values. I then explore the curriculum guidelines for the teaching of values both generally and in respect of Life Orientation. Finally given the strong emphasis on the professional judgement of educators in policy documents, I examine what the professional judgement of educators in respect of the teaching of values entails.

It is generally accepted that the responsibility to teach values does not only rest with schools. Civic institutions share the responsibility to teach positive values, but as Waghid (2004:44) points out, these institutions also have the potential of indoctrinating learners with negative attitudes of intolerance and racism. He therefore concludes: “that the virtues of responsible citizenship

can best be learned in schools.” Justice O’Regan speaking at Saamtrek: Values Education and Democracy in the 21<sup>st</sup> Century (2001) agreed that schools are probably in the best position to teach values but held that the manner in which we teach probably does more to instil values than the subject matter of what we teach. This view is endorsed by Waghid (2004: 44) who believes that:

... schools must educate learners how to engage in the kind of critical reasoning and moral perspectives that define public reasonableness and hence promoting these sorts of virtues is one of the fundamental justifications for (values) education.

Waghid (2004:532) alerts us to what is constitutive of moral judgement in democracies and suggests that “moral judgement pre-supposes an ability among citizens to appreciate not only the arguments of those who support their position, but also of those who oppose it; a competence in moral reasoning that is crucial for participating in a democratic society.” Enslin, (1984), commenting on the crucial pedagogical role of educators in democracies remarked that for democracies to thrive citizens have to be taught to be democrats.

If we accept that there is a crucial role for values education in schools, then it is important to explore different approaches to the teaching of values to identify their strengths and weaknesses so that schools and educators can be capacitated to deliver this mandate.

## **4.2 APPROACHES TO THE TEACHING OF VALUES**

### **4.2.1 BEHAVIOURIST APPROACHES**

Behaviourist theories assume that knowledge is acquired either through the strategic use of rewards Skinner (1971) or the observation of the behaviour of others and the rewards it elicits Bandura (1974). Skinner’s (1971) theory of

behaviourism has been and continues to be very influential in educational thinking. Important concepts that inform this theory are stimuli, response and rewards. The social learning approach as presented by Bandura (1974) is based on the premise that learning occurs through observational learning and imitation of the behaviour of role models. The behaviour of educators, parents, peers and members of society are modelled to learners, who in turn, may choose to imitate and reproduce such forms of behaviour through observational learning. Behaviourist learning theorists believe that moral behaviour is learnt in the same way that other forms of social behaviour are learnt: through reinforcement with rewards and punishment and by observational learning of others being rewarded. Behaviourist approaches claim only to be able to increase the likelihood of certain observable behaviours which, in terms of Ryle's framework, amounts to operational knowledge or knowledge of 'how to do' things.

Rewards may serve as temporary motivation and immediate gratification for learners to be good and this may result in a lack of real commitment to continue to do the right thing or 'to follow the rules.' In this case learners tend to exhibit good conduct simply as a means to an end and the inculcation and internalization of values loses importance. The result of this is that learners who are frequently rewarded, are likely to only behave pro-socially when they believe external pressures or rewards are present and not from any real desire to want to be good. The point is that the primary motive may be to gain rewards and as Lipman (1996) asserts: this approach helps learners to achieve outward commendation at the expense of inner conviction.

However it is important not to ignore the potential of social learning theory. If positive values are 'caught' it must be from some admired role model. Role models who express certain positive values and display satisfaction when these values are upheld and rewarded, have an important role to play in the value formation of their admirers. This suggests that identifying learners' role models may be instructive.

#### 4.2.2 KOHLBERG'S STAGE THEORY

Kohlberg cited in Nucci (2004) rejects the notion that values education could be comprised of a moral agenda that spells out lists of values to be learnt. Kohlberg's work (1963, 1981) has remained influential in research on moral development as he provides clarity on the perceived relationship between reasoning and morality. One of the real strengths of Kohlberg's approach to moral education in schools according to Nucci (2001:9) is that "it was grounded in research on moral development and associated philosophical analyses." Nucci regards this as a very important point about moral education for, as she sees it, it highlights a crucial shortcoming of most approaches to moral education; all too often psychology is expected to provide only methods for moral teaching without questioning or examining why. It is these insights that have motivated me to fuse philosophical and psychological frameworks in this study on the teaching and assessment of values.

Kohlberg's research is based on studies of the moral judgments that individuals make when confronted with a hypothetical moral dilemma, the most famous being the Heinz dilemma which poses the question of whether it could ever be morally right to steal in order to save a life. He developed a framework based on the findings of this research which proposes that "moral reasoning is related to the development of specific levels of cognition" (Papalia & Olds 1978:217). Kohlberg believes that the capacity to make moral judgements of right or wrong depends on the capacity to reason. He sees moral development as part of a natural maturation process that can be facilitated, but not unduly hastened.

Stages 1 and II in Kohlberg's scheme are referred to as the stage of Pre-conventional Morality. What is typical of this stage is unquestioning obedience based on the power of authority figures (usually parents or educators). During stage I rules are accepted without question by children and right and wrong are whatever is rewarded or punished. Moral judgements

are made on the basis of observable consequences, not the doer's intentions. A young child will therefore think that it is worse to make a big mess while helping someone, than to make a small mess while fooling around. In Stage II the child is still focused on his /her own needs, and right or wrong are seen as what satisfies those needs. Children generally behave well in order to get what they want or to avoid the unpleasantness of punishment.

Stages III and IV are known as the stage of Conventional Morality. At stage III the individual is able to consider the views of others as well as obedience to the rule of law. Right behaviour is what pleases other people. It is at this stage that children are able to learn pro-social behaviour and understand what is required to be a good citizen. The notion of what constitutes a "good" or "bad" child operates at this stage. The individual is now capable of judging actions and intentions. At Stage IV the child enters the law and order stage, in which right is seen as doing one's duty according to the norms and rules of society, such as showing respect for authority and rules are adhered to because a sense of conscience has developed.

Stages V and VI represent the stages of Post-conventional Morality. Individuals base moral decisions on principled reasoning: a sense of responsibility develops and actions, intentions and consequences for the self and others are considered. Right is seen not so much as a matter of social rules, but rather as a matter of personally held views. Laws are not seen as absolutes and may change. Stage V reasoning is based on making moral decisions that are established through mutual agreement such as majority rules and consensus. At stage VI according to Kohlberg, right conduct is determined by self-chosen moral principles and is based on respect for the dignity of human beings. Reasoning is based on the universal principles of justice and liberty, even if they conflict with social norms or oppose rules.

Kohlberg's account of how people develop through these stages is linked to Piaget's theory of cognitive development. Stages 5 and 6 are only considered

possible once individuals have reached the stage of formal operations which usually occurs during adolescence. Both Piaget and Kohlberg assume that development is an individual process dependent on the active involvement of the developing person and the provision of appropriate environmental stimuli.

Kohlberg suggests that adolescents should engage in the discussion of hypothetical moral dilemmas to promote moral reasoning and encourage movement towards the next stage. The aim of this approach is to strengthen children's reasoning and moral judgement through dialogue, discussion and deliberation so generally speaking it is a learner-centred approach, based on constructivist principles which let the learners take over their own learning. Any adult present facilitates discussion but does not prescribe values. This approach is supported by Blatt and Kohlberg (1975), Galbraith and Jones (1976), and Howard-Hamilton (1995). Discussion-based approaches such as debates, small group discussions, brain storming activities and speeches are widely used although Taylor (1994) points out that discussion may be viewed as having low status as a teaching method. It is commonly agreed that the success of any discussion-based activity is determined by the communication skills and attitudes of children. Moreover, discussion does not automatically lead to desirable social values. Cohen (quoted in Klein, 1993) found that children did not necessarily change their racist views when challenged to examine them in open discussion.

I do not agree with Cohen's view for, as Kohlberg's theory has shown, it depends on the stage of moral reasoning that learners and even adults have reached. While discussion of racism leaves a great deal to an individual's judgment and younger learners may not be able to discuss complex issues possibly because of a limited moral vocabulary, they can be inducted to discussions of moral challenges such as bullying or name calling as Kohlberg (1978) suggests. Moreover children are very often not even aware of racism they learn to be racist by imitating the behaviour of adults. Discussion does in

fact offer fruitful opportunities to discuss moral issues with younger learners to unlearn negative behavioural patterns, providing that such discussions relate to the experiences of learners. I believe that when learners and adults experience real freedom in a non-threatening, learning environment, they are more eager to communicate their points of view and learn from each other even about contentious issues such as culture, sexism and racism. In such learning environments new meanings can be constructed and points of view modified as new perspectives are developed.

Kohlberg's theory is also claimed by the values clarification approach to the teaching of values, which is strongly influenced by individualist Piagetian views and the assumption that reasoning individuals will choose desirable values. It maintains that moral education must promote freedom of choice of the individual; which seems to imply freedom from any form of influence, coercion or indoctrination. This approach is grounded in the assumption that values are a matter of personal choice, concern and reflection and therefore it rejects any attempts from religion, society, politics or tradition to impose values on the young.

It is asserted that the values clarification model rejects any notion of conformity to some external code or norms of behaviour, or the common good that is exclusively determined by a social institution. Milson and Mehlig, (2002) have condemned this approach where individuals have freedom of choice to the exclusion of concern for others as morally relativistic.

A limitation of moral relativism is that valuing the common good, cannot flourish without inter-subjective agreement among members of what constitutes the moral good. Morrow (1989:176) agrees and maintains that:

... shared goods are not merely the convergence of various interests, but articulation of principles which give unity and direction to the life of the community... their common

appreciation is constitutive of them...what binds a community together is shared goods.

As pointed out by Papalia and Olds (1978: 284) “Kohlberg’s theory describes moral judgements rather than moral action” and moral judgment as is commonly known, does not necessarily result in moral action as Kohlberg seems to assume. One can hardly solve a moral problem by merely uttering or forming a judgement. It is the actual doing that constitutes solving the problem not merely the judgement. So, Kohlberg is perhaps guilty of idealism as his theories tend to present a conceptual relationship between moral judgment and moral action, and he paints a much neater picture of uniform moral development in human beings than that which we experience in reality. Muuss (1988) draws our attention to the fact that Kohlberg questioned his own assumptions about moral reasoning in the sixth stage, citing the difficulty of finding people at such a high level of moral development. Naude (2008) has similarly pointed out that some people never develop to Kohlberg’s sixth stage of moral reasoning.

#### **4.2.3 INSIGHTS DRAWN FROM VYGOTSKY’S THEORY**

Kohlberg’s theory is based on Piaget’s individual constructivist understanding of cognitive development, which assumes that each person individually arrives at a higher level of development through his/her own efforts to make meaning from environmental stimuli. This would suggest that educators provide stimuli, but refrain from offering guidance. Vygotsky (1978) strongly opposes the individual constructivist understanding of human development proposed by Piaget and Kohlberg (the latter believes that children are “moral philosophers” who work out their moral systems by independent discovery) and believes that human beings are social by nature, and that human behaviour therefore is shaped by the social context in which it occurs.



Vygotsky believes that the process of learning needs social interaction with others during which the content of learning is negotiated and renegotiated. The knowledge that has already been constructed through inter-subjective agreement in social contexts by past generations is thus both perpetuated and reconstructed. This social constructivist view presents a challenge to the individual constructivist theories of Piaget and Kohlberg as it introduces and stresses the role that mediation plays in stimulating the development of intellectual capacities in children. Fisher (1998:61) is quoted as saying that: “Vygotsky reminds us that our intellectual range can be extended through the mediation of and interaction with others, by the social distribution of intelligence.” Vygotsky defines cognitive development from this perspective of mediation as consisting of coming to find and handle particular problems, building on the intellectual tools inherited from previous generations and the social resources provided by other people.

Piaget and Vygotsky share some important areas of agreement for example, in respect of the role of agency and activity as the foundation for the development of thinking and reasoning, but Vygotsky places far greater emphasis on the role of socialization through language, communication, social interaction, instruction and mediation from those whom Green (2001:84) refers to as “more knowledgeable others...” Morrow (1989:117) makes a similar point about the importance of mediation when he says:

Immature human beings are dependent not only for their survival, but also for development into rational beings on the benevolent actions of the more mature human beings amongst whom they live.

Vygotsky also rejects Piaget’s notion of fixed stages of development and argues that younger children are capable of reasoning about moral issues and values if equipped with the appropriate thinking skills and if the moral issue relates to their own social experiences. If Vygotsky is right about how

children develop as thinkers, it seems reasonable to assume, firstly, that younger children can also benefit from discussion of moral issues and, secondly, that moral development requires more mediation than Kohlberg would propose. Some critics Lickona (1991) suggest that Kohlberg did not give enough attention to the role of mediation in his presentation of theoretical moral dilemmas. If we consider Vygotsky's belief in the role of social mediation, then what Kohlberg, drawing on Piaget, says has to be re-examined.

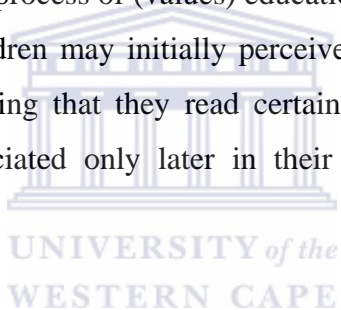
Vygotsky's theory suggests that we have a collective social responsibility in mediating moral issues to children. This, by implication seems to suggest that more active mediators and strategies for mediation are needed to encourage the development of positive values and dispositions. Waghid (2004:44) concurs with this view and maintains "it seems clear that no single institution can be relied upon as the exclusive seedbed of civic virtue." Glendon, (1991: 109) in support of Waghid, points out, that, just as is the case with state institutions such as schools, institutions of civil society (churches, unions and forums of civil society) "equally have the potential to teach disobedience to authority and intolerance of other faiths and races. The point is that neither schools nor any other institution of society can guarantee civic virtue.

#### **4.2.4 INSIGHTS FROM AUTHORITARIAN APPROACHES**

According to Fisher (1998) authoritarian approaches assume that it is sufficient simply to tell children what they need to know and what they ought to do. This approach in terms of Ryle's framework translates into "knowing that." Such approaches are sometimes referred to as authority-based as they take it for granted that the religious, parental or other authority involved will be respected without question. They frequently rely on direct instruction and may make use of behaviourist strategies. Proponents of initiatives that actively reject the moral relativism implied by extreme Piagetian views, such

as Character Education Lickona (1991), Wynne and Ryan (1992), Molnar (1997) tend to favour direct instruction and behaviourist strategies.

Criticism levelled against authoritarian approaches of whatever persuasion is that they can be seen as a form of moral indoctrination and the danger is that children who are subjected to indoctrination may become vulnerable to other forms of abuse. According to Fisher (1998) indoctrination does provide the necessary social boundaries and conditions for education to take place, but it does not foster the desire in learners to develop their own set of personal values such as care, concern, or respect for others. Morrow (1989) makes a distinction between negative indoctrination in the sense as referred to by Fisher and benevolent indoctrination which he believes is at times unavoidable in the process of (values) education. As is commonly known, the value of what children may initially perceive to be negative indoctrination, (for instance insisting that they read certain books or attend church) may possibly be appreciated only later in their lives as forms of benevolent indoctrination.



The fact that children tend to interpret this approach as brain-washing, bribing, manipulation or indoctrination may render it ineffective on its own as a means of values education. I speculate that learners ignore moral education primarily because they are treated as spectators and believe that moral education 'is being done to them.' This model fails to actively engage learners (through teaching and discussion) and unless it involves them, they do not share the responsibility for their moral development. Authoritarian approaches (obedience to rules and regulations) to moral education could result in characters being constructed to gain the approval of parents and teachers, earn rewards, praise and privileges, without the development of individual identity. The challenge seems to be to find a balance between extreme forms of authority and no authority.

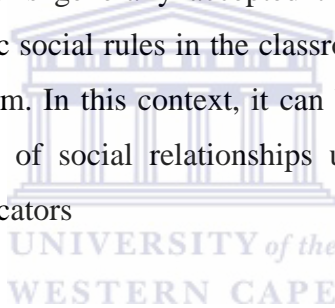
### 4.3 STRATEGIES FOR TEACHING VALUES

Despite different assumptions about how values are acquired several strategies are common to more than one approach. The most frequently mentioned strategies are the use of stories, the creation of extra-curricular opportunities to act compassionately, and engagement in various forms of discussion, with or without the active mediation of effective thinking skills and dispositions.

Stories are considered to play an important part in the moral development in children because they can expand and enhance the moral imagination and develop the emotional side of a child's character (Lickona, 1991). Kozulin (1991) points out that literature is considered an important psychological tool by Russian psychologists. Lipman (1961) maintains that stories provide an opportunity to articulate issues of concern to children and young people and to model ways of deliberating about them. They can also offer role models in terms of values. Clearly stories may be used in a variety of ways, to teach obedience, to inspire, to model, or to generate discussion.

There is considerable agreement about the value of discussion, whether it is conceptualized as circle time (Gilligan, 1982; Noddings, 1984) community of inquiry (Lipman, 1961) or deliberation (MacIntyre, 1999). The latter explains that deliberation occurs in situations (classrooms) when people (learners) care, respect and engage justly in discussion with each other, which resonates with a Vygotskian understanding of the role of mediation. This view conveys the idea of creating a democratic culture in classrooms which is in line with the expectations of the South African curriculum. Waghid supports MacIntyre's conception of deliberation and explains that deliberation is a form of intelligent action which encourages teachers and students to reflect upon problems, stimulates them to acquire new ways of solving problems, and engenders possibilities through which problems could be examined.

Both Piagetian and Vygotskian approaches to discussion open up the possibility for value choices, but the latter would emphasize the active role of the mediator in influencing (but not determining) both how to think and what to think. Discussion need not only be about hypothetical moral dilemmas. It may concern everyday decisions, or take the form of learner involvement in the classroom and school discipline procedures or community service. The objectives are to help them to understand the nature of rules; to understand the inter-relatedness of rights and responsibilities of citizenship; to become morally just and to act in the face of injustice and to care about the plight of others. It is assumed that learners will be more motivated to obey rules and act in accordance with a Code of Conduct that has been negotiated with them (Garner, 1992; Nobes, 1999). Obedience to rules is part of the process of socialisation and it is generally accepted that younger learners should be taught to obey basic social rules in the classroom, but that these rules should be explained to them. In this context, it can be seen as a process of gaining new understanding of social relationships under the supervision of more knowledgeable educators



The focus of such discussions could also include social issues for example the recent incidences of xenophobia in South Africa which learners may have witnessed; taxi violence and the need for deliberation and efforts to find peaceful solutions to these. Drug abuse especially the notorious TIK drug, alcoholism, the abuse of women and children, unemployment, HIV/AIDS, teenage pregnancies and school drop outs are social ills that most societies experience. For as Gyekye (1997: 74) has pointed out “...our moral sensitivities should extend to people beyond our communities.” Environmental concerns such as the fires that annually destroy valuable land and property in the Western Cape often as a result of the irresponsible behaviour of smokers and the reasons for saving water also provide topics for discussion. These are topics related to human rights and values and are in line with the aims of the Constitution and the curriculum.

Waghid (2004) points out that the Manifesto aims to cultivate in learners the capacity for respectful dialogue and deliberation. He believes however, that learners should also be taught through dialogue and deliberation to develop a sense of caring and compassion. Nussbaum (2001) believes that compassion extends or “pushes the boundaries of the self” outwards as it enables one to focus away from the self to the suffering and hardships of others. As explained by Nussbaum (2001: 3) “without emotional development, a part of our reasoning capacity as political and social creatures will be missing.” International literature seems to have taken on board this notion and recommends involving learners in community service in which they assist others, as an effective way of teaching learners to “live” values such as caring and compassion. In South Africa, the tendency seems to be to require evidence of community service when applications are made for certain types of employment, bursaries or admission to certain fields of study, but the notion of community service, for various reasons, has not yet been taken on board by many schools.

#### **4.4 RESEARCH EVIDENCE**

The literature that I referred to in the previous section offers explanations and suggestions related to the teaching of values. The question is what evidence is available about the effectiveness of various strategies and about the attitudes and practices of educators with regard to the teaching of values?

Very few, if any, educational challenges are straightforward enough to have simple answers or solutions and the teaching of values is no exception. I do not think that the most effective approach could be ‘assessed or measured’ but it is clear that some approaches may be better in some contexts and for some purposes than others. For example, if one compared behaviourist approaches with those that encourage discussion, it is obvious that a combination of these approaches would be more effective than any single one as these theories tend to draw strength from each other. So, it is difficult to

single out the most effective model for the teaching of values. While the literature does offer suggestions about possible strengths and weaknesses of approaches, I did not find any strong claims in the literature for the success of a specific approach. This is not surprising since, as I shall argue in the next chapter, the assessment of the most effective strategies for values education in any meaningful way is almost impossible.

However, there is some evidence available regarding educators' attitudes to the teaching of values. International research suggests that educators tend to accept that the school is a moral environment and that part of their role is to provide moral education (Henson, 2001; Maslovaty, 2000; Milson and Mehlig, 2002; Zuzovsky, Yakir and Gottlieb, 1995). Green (2004a) notes that, the literature indicates that educators internationally tend to support universal values such as human dignity, diversity and nationalist democratic values. The most frequent ethical stance adopted by educators in various countries, she adds, appears to be consensus pluralism, an acceptable position, but one that can lead to avoidance and confusion in schools, and, if extreme, can result in a moral vacuum as Veugelers (2000b) has pointed out. He maintains that it is not possible or desirable for schools to adopt a value-neutral position. A survey conducted by Stephenson, Ling, Burman and Cooper (1998) indicates that while most educators in the United Kingdom support the idea of values education as a means for raising standards of positive behaviour, they have difficulty in identifying suitable values and consider it impossible to teach values that they do not personally embrace.

Findings regarding educators in South Africa are more limited but Green (2004a) found that local educators acknowledged that their professional role included a moral dimension. According to Rhodes & Roux (2000) educators displayed uncertainty with the identification of values that are embedded in different learning areas, the philosophical and conceptual underpinnings of values and the methodologies required to teach values successfully. Green's (2004b) article refers to school-based research conducted for the Department

of Education in South Africa which indicates that educators believe that the government overemphasises human rights of learners.

Furthermore educators generally believe that training in moral education for educators is necessary. Therefore purposeful teacher-training and the provision and development of effective teaching strategies for values education must be prioritised (Jansen & Christie 1999). The view that educators need to be capacitated for the task of teaching values and that their legitimate perspectives and concerns should be accommodated for the successful transfer of values is confirmed by the research of Rhodes & Roux (2004) which indicates that because of these reasons and others, most educators have not played an active or successful role in teaching different values and belief systems in schools.

## **4.5 THE CURRICULUM AND THE TEACHING OF VALUES**

### **4.5.1 IMPLICATIONS OF CURRICULUM PRINCIPLES**

General guidelines that need to be considered for all Learning Areas are contained in The Teacher's Guide for the Development of Learning Programmes Policy Guidelines (DoE, 2003: 1-14). This document states that to achieve the aim of Learning Programmes, Work Schedules and Lesson Plans the following aspects have to be considered during planning:

Under Philosophy and Policy it is pointed out that the curriculum is an embodiment of the nation's social values and its expectations of roles, rights and responsibilities of the democratic citizen as expressed in the Constitution. Outcomes-based education philosophy and practice, based on the Critical and Developmental outcomes is the underlying educational philosophy. The critical and developmental outcomes are a list of outcomes that are derived from the Constitution and are contained in the South African Qualifications



Act (1995). They describe the kind of citizen that the education and training system should aim to create.

The Critical Outcomes are:

To be able to:

- Identify and solve problems and make decisions using critical and creative thinking
- Work effectively with others as members of a team, group or organisation and community
- Organise and manage themselves and their activities responsibly and effectively
- Collect, analyse, organise and critically evaluate information
- Communicate effectively using visual, symbolic and/or language skills in various modes
- Use Science and Technology effectively and critically showing responsibility towards the environment and the health of others
- Demonstrate an understanding as the world as a set of related systems.

The Developmental Outcomes envisage learners who are also able to:

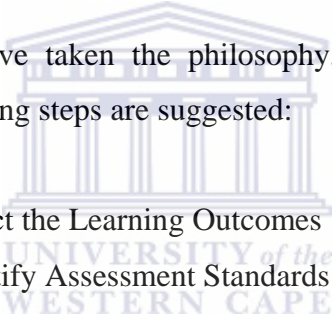
- Reflect on and explore a variety of strategies to learn more effectively
- Participate as responsible citizens in the life of local, national and global communities
- Be culturally and aesthetically sensitive across a range of social contexts
- Explore education and career opportunities
- Develop entrepreneurial opportunities

Under Principles underpinning the curriculum it is noted that the curriculum builds on the vision and values on the Constitution and C2005 and that is based on the principles of social justice, a healthy environment, human rights and inclusivity. In particular, the curriculum attempts to be sensitive to issues of poverty, inequality, race, gender, age, disability and such challenges as HIV/AIDS (DoE 2000).

#### **4.5.2 SPECIFIC CURRICULUM GUIDELINES**

The Teacher's Guide explains that integrated learning is central to outcomes-based education. Educators need to have a clear understanding of the role of integration within their Learning Programmes.

Once educators have taken the philosophy, policy and other issues into account, the following steps are suggested:

- 
- Select the Learning Outcomes
  - Identify Assessment Standards
  - Determine the teaching, learning and assessment context and/or core knowledge and concepts

Two main contexts have been identified; firstly the broad consideration of the social, economic, cultural and environmental contexts of the learners and secondly, contexts unique to the Learning Area. Such contexts are to be reflected in the kinds of examples used, the types of projects given, the language used, the barriers to learning anticipated, and the teaching, learning and assessment activities. In those Learning Areas where contextual information that is unique to Learning Areas is not provided, educators need to determine their own (The Teacher's Guide for the Development of Learning Programmes Policy Guidelines, DoE 2003).

The Teacher's Guide continues that educators must decide how they will approach their teaching and what methods they will use bearing in mind that learners have different learning styles and that some activities are more likely to succeed than others. Barriers to learning, resources, prior learning and school policies need to be considered. Lesson plan development, as is pointed out, is not a linear process, but rather one of continual modification, reflection, revision and refinement.

The main thrust of the Learning Area named Life Orientation is to enhance *the self in society*. Instilling Human Rights and promoting environmental and social justice issues will therefore always form the core. In Life Orientation it is useful for the teacher to use experiential learning and teaching methods. Learning and teaching activities must focus on the acquisition of knowledge, skills and values relevant to functioning effectively in society. Lessons should be interactive and stimulate learner interest. It is important for the teacher to be flexible and to always take the needs and realities of learners into account as the learners' needs and experiences form the basis for learning and teaching. Teachers should encourage reflection and allow for the application of knowledge and skills learnt. Learners must be made aware of and be taught to respect cultural diversity (DoE 2003).

Rasool (1999) pointed out that OBE side-stepped the issue of values by not providing clear guidelines on how values should be taught and which values should be prioritised. The Chair of the Curriculum 2005 Review Committee, Linda Chisholm also criticised C2005 for its lack of clarity on values and pointed out that ... "It also does not provide a strong enough statement about which values the curriculum promotes and which it does not promote" (DoE 2000:197-219). It is obvious that curriculum principles are broad guidelines that lack specificity of what methodologies could be appropriate for the teaching of values and which approaches are better than others.

But the policy/practice debates on curriculum seem to focus primarily on the implementation of policies, but tend to leave the conceptualisation of curriculum as Carrim and Keet (2005) for example demonstrate, unexamined. I want to signal as an aside, that some of the most important sources of data are often impossible to trace and that some data are never published or made available for dissemination. Numerous attempts to secure information from others who had been involved in this working group proved to be futile. So availability of information in respect of the Report of the Human Rights Inclusivity Working Group which formed part of the Review Committee of C2005 on the infusion of values in the curriculum has been a challenge for this study.

While this could possibly be seen as a weakness, this study has nevertheless gained valuable insights (which were confirmed by other sources) from this article. Meyers & Rockwell (1984:23) commenting on the constraints that researchers like myself faced in obtaining data, offer the following advice: “Often, the researcher must accommodate his or her research ... to the constraints imposed by using data that someone else has collected for different purposes.”

According to Carrim & Keet (2005: 99) the brief of the Human Rights and Inclusivity Working Group (HRIWG) was “to infuse human rights in the RNCS.” What this brief meant, as I will demonstrate, is far from clear. According to Carrim & Keet attempts at infusing values in education elsewhere have generally tended to be of three primary sorts each of which has different implications for the teaching and assessment of values;

- To teach knowledge about human rights; their constitutional and legal definitions and provisions
- To focus on how to access such rights mainly as versions of “civic education”

- To focus on the valuing human rights - acting in accordance with these values

The knowledge systems provided by Ryle (1971) and Mason (1997) which if applied to values education, demonstrate that depending on how human rights is conceptualised, the infusion of human rights in the curriculum could mean three approaches:

- Firstly, learners should be taught knowledge about human rights in order to know about it
- Secondly, values should be promoted through understanding of how to access human rights; follow procedures and processes in making decisions about human rights
- Thirdly, learners should be taught to value human rights

The first approach: knowledge about values according to Carrim and Keet has been criticised by Osler and Starkey (1996) as being limited as the latter maintain that such an approach focus on understanding what values are but does not sufficiently recognise the “affective dimension” of values. Tibbuts (1995) has emphasised the second approach; the need not only to focus on human rights, but also on their accompanying skills and attitudes while Reardon, (1995, 1997) has stressed the need for values to centrally inform human rights. Reardon makes a distinction between human rights and values and believes that the moral aspects of rights are crucial to an appreciation and valuing of human rights, which is consistent with the third approach. Reardon explains that education in and of values, is crucial for the preservation and development of human rights including those in schools.

Carrim and Keet identified their conceptual understanding of human rights and values as problematic for infusion into a curriculum that is underpinned by a different conceptual understanding of human rights. Their argument is that only if the infusion of human rights is conceived of exclusively in terms

of propositional knowledge and access to it, it is possible to teach and assess human rights in terms of how they are conceptualised in the curriculum (Carrim & Keet, 2005:105).

#### **4.6 THE PROFESSIONAL JUDGEMENT OF EDUCATORS IN THE TEACHING OF VALUES**

The Collins English Dictionary (2004:1296) explains professional in the following way; “a person who engages in an activity with great competence.” Judgement (2004:856) is described as “the faculty of being able to make critical distinctions and achieve a balanced viewpoint.” In Vine’s (1940) expository dictionary of New Testament words, one of the Greek words translated as judgment is partially defined as a decision passed on the faults of others and is cross-referenced to the word condemnation. According to this same source, one of the Greek words translated as “judge” is partially defined as “to form an opinion” and is cross-referenced to the word “sentence.” Which of these interpretations of “professional judgement” best represents the view of professional judgement in the teaching and assessment of values as advocated by the curriculum? Is it fault- finding, condemnation or to pronounce a sentence or an evaluation of the values that learners ought to have acquired, particularly as it is not known on what evidence of moral learning professional judgement is based?

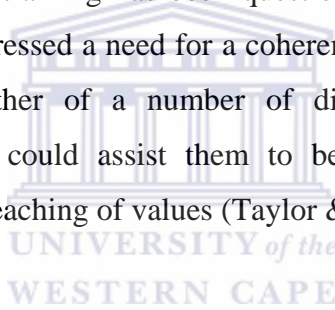
Shulman (1987) and Downie (1990) who argue in favour of a professional knowledge base in teaching, claim that the first requirement of a profession is its knowledge base, as this is what is distinctive about professions and what affords them integrity and social importance. Sockett (1987:12) has interestingly called for an “epistemology of the practice of teaching that could serve as reference points for professional judgement in situations of uncertainty” such as the teaching of values.

It is commonly known that the knowledge base of educators consists of different kinds of knowledges. Tacit knowledge is described by Linley and Joseph (2004) as a crucial component of wise decision making. It describes knowledge that is implicit, intuitive, acquired without instruction, and is procedural rather than propositional. Shulman (1987) in agreement with this view suggests that the knowledge base of teachers should not only consist of a balance between theory and practice, but should also be informed by the wisdom of practice which refers to the intuitive knowledge and experiential knowledge and insights that educators gain through experience in their practice.

The theories of learning of Piaget, Kohlberg and Vygotsky inform us on how knowledge is acquired. The acquisition of moral knowledge based on what these theories suggest, require educators to be knowledgeable about different stages of cognitive development, how moral learning occurs, different approaches to moral learning, which values to teach at what stage of moral development, as well as the crucial role of mediators for effective moral learning.. This view is supported by Fisher (1995) who holds that being knowledgeable as a moral educator implies being able to reason about moral concerns. What this indicates is that theoretical knowledge is equally necessary for the effective teaching of values. While tacit knowledge is an important component of professional judgement, it cannot be conceived of as a substitute for professional knowledge but should inform the professional knowledge base of educators. I conclude that the professional judgement of educators requires horizontal as well as vertical knowledge; theoretical knowledge from psychology and philosophy, tacit knowledge, experiential knowledge and the wisdom gained through practice.

Clearly the curriculum guidelines do not offer much help in terms of teaching strategies for values education and much is left to the conceptualisation and interpretation of methodologies based on the professional judgement of educators. While there is guidance on what content should be taught, and

references to experiential learning and interactive teaching or reflection in the guidelines, the application of these concepts in practice; the “how to do it” is lacking. For example, Resource Material for the Life Orientation Learning Area (Foundation Phase) WCED (2003: 4) in referring to lesson plans, states that “it should include the how.” Educators are required to provide an account of their teaching style, approach, methodology and assessment activities to be managed in the classroom but the guidelines do not provide any example of how this should be done. It needs to be taken into account that the explicit teaching of values did not form part of the pre-outcomes based curriculum and as Jansen & Christie (1999) have indicated, teachers had no involvement in the conceptualisation of OBE. Furthermore educators had received minimum formal preparation and training and the effectiveness of the Cascade Model of training has been questioned. Educators in South Africa have generally expressed a need for a coherent strategy for values education; the bringing together of a number of different teaching and learning approaches which could assist them to become more effective in their approaches to the teaching of values (Taylor & Vinjevoldt, 2001).



#### **4.7 CONCLUSION**

From the literature it is clear, that generally, all theories and approaches to the teaching of positive values, whatever their differences and limitations in other respects, suggest that values can be taught. Piaget, Kohlberg and Vygotsky point out the importance of moral reasoning and the need for learners to be actively involved in the valuing process. Vygotsky emphasises the importance of active mediation by more knowledgeable others in society, while behaviourist approaches demonstrate the power of rewards, punishment and modelling behaviour.

If we accept Vygotsky’s insights, we have to conclude that values knowledge cannot be limited to discussions of theoretical moral dilemmas as values education, it seems, needs to be informed not only by Kohlberg’s stage



theory of moral development, with its Piagetian implications in respect of cognitive development but also by active mediation. Kohlberg's belief that children are "moral philosophers" who work out their moral systems by independent discovery is questionable as studies show that moral judgements are strongly influenced by education Lickona (1973) which includes the teaching and mediation of values. These insights demonstrate that different approaches, whatever their weaknesses in one area, have strengths in other areas and that a combination of approaches may provide a more holistic approach to the teaching of values knowledge.

I therefore agree with Green (2004a), who concludes that no single approach to values education has all the answers and is known to guarantee success. Any approach that encourages learners to reason about values and engage in actions in accordance with positive values should thus be pursued. It appears that the most widely held view is that the teaching of values requires active involvement of learners, strong mediation that will facilitate moral reasoning, responsible, informed discussion and decision-making which will culminate in moral action.

A central aim of the teaching of (values) education should therefore be for educators to provide continual opportunities to equip learners with tools that will enable them to "live values" by acting in morally acceptable ways. The importance of using teaching methodologies that create an atmosphere in which learners are genuinely free, within a context of what Waghid refers to as 'respectful disagreement' to disagree, propose alternatives, and modify positions on issues relating to values cannot be over emphasised. Curriculum guidelines rely on the critical and developmental outcomes and significant importance is attached to the professional judgement of educators in the teaching of values. So it is important for educators to acquire a strong knowledge base that is informed by theoretical, tacit, intuition and the wisdom of practice knowledge. Waghid (2004:47) underscores the need for teacher training and holds: "My contention is that it will be difficult for

learners to learn about compassionate citizenship if their educators are not skilled appropriately.”



## **CHAPTER FIVE**

### **THE ASSESSMENT OF VALUES**

#### **5.1 INTRODUCTION**

The aim of this chapter is to explore different perspectives on the assessment of values both internationally and locally. I begin by exploring international and local policy debates regarding the assessment of values. I analyse the concept of assessment to clarify the often unexamined underlying assumptions about this term and to distinguish it from measurement. Then I discuss the implications for the assessment of values in OBE. I examine specific curriculum guidelines offered to educators for the assessment and measurement of values and unpack their implications. Finally I discuss the professional judgement of educators as an important element of the assessment of values.

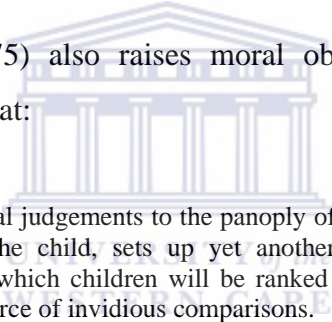
#### **5.2 THE DESIRABILITY OF ASSESSING VALUES**

Is it possible to assess and measure the stuff of life: love, care, hatred, prejudice, tolerance, respect and compassion? Not too many countries outside South Africa, it seems, consider the assessment of values as a priority for education as yet. The literature indicates that views about the assessment and measurement of values internationally seem to fit into one of these categories:

- Values should not be assessed because of moral objections
- Values are too complex to be measured
- Values can only be assessed to a certain extent

I have selected literature which seems to support each of these categories in order to clarify the different points of view that exist in debates regarding the assessment and measurement of values. In the Netherlands, according to Veugelers (2003) there are many objections to the assessment of values. He points out that apart from the pedagogical concerns of how values can be assessed there are moral questions of whether a school or a teacher has the right to assess learners on values that they *ought* to have acquired. As a result of these challenges “schools in the Netherlands do not assess students with regard to their values or subject related values” (Veugelers, 2003:380). While there is strong support for the assessment of educator practices and pedagogy in respect of values education in the Netherlands, there is general agreement that the acquisition of values of individual learners should not be assessed.

Goodman (1998:475) also raises moral objections to the assessment of values. She holds that:

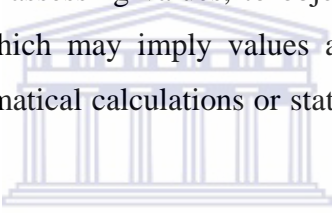


... adding moral judgements to the panoply of judgements already visited upon the child, sets up yet another hierarchy, another dimension on which children will be ranked and found wanting, yet another source of invidious comparisons.

She considers it bad enough that children are labelled cognitively slow or fast; (in South African terms has achieved or has not achieved), now they will also be labelled morally. Goodman’s position is that it is not considered moral to assess the values that learners ought to have acquired and therefore values should not be assessed. The views of Veugelers (2003) and Goodman (1998) who believe that the assessment of values may burden some children with feelings of shame and guilt and undermine their self-worth need to be seriously considered. This is a serious risk to take, for, apart from the possible damage to learners themselves, parents usually do not react favourably to implications that they have not nurtured positive values in their children.

Furthermore children's constant concern over doing what is expected and fear of not living up to such expectations may perversely, inhibit the development of a rational moral conscience; just the opposite of what an educator would want to achieve. Matthews (1978) cautions that the assessment of values is not subject to facile solutions as unfair, biased assessment and damage to teacher-learner relationships come immediately to mind. Moreover moral sceptics claim that we now live in an age of moral relativism, possibly without a general consensus on what constitutes the moral good so that what constitutes the good life is a matter of opinion which may ultimately be entirely subjective.

Forster (2001:33) writing about Australian schools shifts the focus from moral objections to assessing values, to objections about assessing areas of school learning (which may imply values and attitudes) that may not be amenable to mathematical calculations or statistical measurement and asserts that:



While we may be able to determine standards of proficiency for literacy and numeracy at points along a continuum; identify relevant indicators of achievement of those standards and even develop valid and reliable assessment instruments for measuring such standards, many areas of school learning are not conducive to such measurement.

Degendhardt (1984:232-252) strongly rejects the view that values can be measured and argues that morality is too complex to be measured:

Complex and elusive phenomena like intelligence, creativity, learning and morality cannot be rendered observable and measurable except by the adoption of distorted and educationally distorting views of what they involve.

O'Connor (1957) maintains that it is impossible to assess values because metaphysical statements, which are assumed to consist of personal feelings, values, attitudes and emotions, cannot either be confirmed or refuted by

evidence which can be collected, checked and assessed, by established and publicly recognised methods.

Kaplan (1964) distinguishes between two categories of things that scientists can measure; those that are directly observable such as the colour of an apple; and those that are indirectly observable such as history books that provide indirect observations of past events and constructs. The latter are theoretical constructs based on observation, but which cannot be directly or indirectly observed such as compassion or a learner's IQ (which is equally debatable). Kaplan (1964: 49) explains that:

The concept of compassion ... is a construct formed from my, yours and everybody else's conception of it. It cannot be observed directly because it does not exist materially and therefore it cannot be measured in these terms.

These writers clearly take seriously the possibility that in dealing with phenomena that are part of the human condition such as moral learning, we may be dealing with something so complex and different from knowledge and skills that a different kind of assessment, if any, is called for.

But Mouton (1996) believes that we can assess anything that exists. He suggests that we need to distinguish between the assessment of acts that imply certain values and the measurement of values. He explains that we all, having observed acts of compassion in many different ways, have our own mental images or conceptions of what acts are subsumed under this concept. We communicate these conceptions to each other until we have a shared inter-subjective agreement of what can/cannot be considered or assessed as acts of compassion. But there are situations where there is no agreement to be found. For example some people see abortion as an act of compassion in certain contexts others regard it as murder irrespective of the context. The point is that what is seen as a moral problem by some people may not be seen as such by others.

According to Mouton, we can *assess* (collect evidence) of values in some ways but not *measure* it. He points out that we can assess (collect evidence) of acts of compassion like supporting AIDS orphans, or saving the whales. But while it is possible to assess (collect evidence) and even count (which implies measurement) the number of times someone provides food for victims of Xenophobia, we cannot possibly be sure of the extent to which these acts are driven by compassion or motives.

While Mouton and Kaplan's distinction between assessment (as the collecting of evidence) and measurement (assigning numbers to evidence) are illuminating, I remain sceptical of Mouton's suggestion that we can count acts that imply values. I do not believe that this suggestion resolves the assessment or non-assessment of values satisfactorily. While I concede that performing acts of compassion is different from the internalisation of compassion, it should also be taken into account that such acts could also purely be means to ends. For while acts may appear to be acts of compassion and assessed as such, the motives, intentions and purposes behind such acts may not be benevolent and may in fact not be driven by the need to show compassion at all.

Peters (1958) makes a distinction between His/Her Reason explanations for human actions and the reason and points out that the reasons given by people for their actions may not be the real reasons. For example large companies may donate money to Aids orphans for the sake of seemingly doing the politically or even the morally correct thing, while the underlying motive may be to attract publicity in order to increase profits. So it seems that even acts that imply values cannot always be assessed with absolute certainty.

Assuming that it is possible to assess values, a further dilemma as I see it is this: is it possible to assess and measure values at different levels in terms of conceptual progression as required by the curriculum? For, unless some means exist for measuring it, for distinguishing between better and poorer

achievement of levels of complexity, conceptual progression will not mean very much. Let me use an example to clarify the point I am making here. Learners can be taught to be honest or dishonest (as not all teaching is necessarily educative). If a learner has been honest and does something dishonest, she has not lost the knowledge of what honesty means, nor some level or degree of honesty; but the ability to *be* honest meaning she has become *dishonest* and this holds true for honesty at any grade, level or situation where honesty is required. How can her “change in behaviour” from honesty to dishonesty be measured?

Fend (1995) maintains that values should be assessed and that to an extent it is possible to do so. Mortimer, Sammons, Stoll, Lewis and Ecob (1988), support Fend’s ideas as their research indicates that teachers in Britain continually monitor the strengths and weaknesses of learners’ behaviour, combining objective assessments with their own judgements in records relating to academic abilities, personal and social development. Buck and Inman (1998:12) in support of the position held by both Fend and Mortimer et al. suggest that “it is appropriate to assess the social and personal development of learners.” The limitations of this position are that it neglects to clarify whether the assessment of values forms part of the assessment; it fails to explain how such assessment can be done, or which assessment instrument could be used to assess the social and personal development of learners. Furthermore, while it expresses support for the assessment of values, it seems as if it is learner behaviour or academic ability that is assessed.

Syllabi and policy documents on education in New South Wales similarly imply support for the assessment of values, as they include statements of the values and attitudes which teachers are required to teach and assess. It is suggested that such assessment may include: “Actions; written, spoken and visual texts. Likert scales and values continuums are suggested as possible instruments for assessment (NSWBOS, 1999b:55). The literature suggests

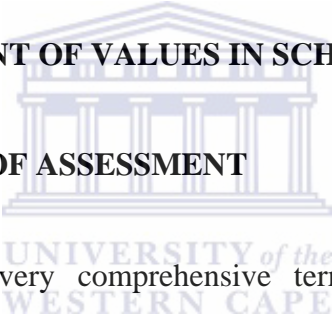


that there is a fair amount of scepticism around the use of these instruments so is not generally agreed that these instruments yield valid results.

The objections and concerns from different perspectives about the desirability of the assessment of values seem reasonable to me. Therefore I conclude that they constitute valid reasons to question, not only from an academic or pedagogical point of view, but also from a moral point of view, the desirability of assessing the values that individual learners hold. My concern is that in the absence of clear curricular guidelines for the assessment of values, educators might be under pressure to implement the same assessment approaches for the assessment of values education as those prescribed for knowledge and skills.

### **5.3 THE ASSESSMENT OF VALUES IN SCHOOLS**

#### **5.3.1 THE CONCEPT OF ASSESSMENT**



Assessment is a very comprehensive term that lends itself to many interpretations. Dictionary definitions explain that to assess is to put a value on something for example, in financial terms. Such definitions, especially if it is educational assessment that is referred to, provide a different meaning of the concept (although we are aware that educational assessment may possibly determine future salary). Therefore, considering the different ways in which the term assessment may be used and the different meanings that are borne by this concept, I believe that interpretations could prove to be more helpful than definitions.

Assessment in education refers to the collecting of information about a learner. This information may be about any aspect of the education process. Rowntree (1987:4) maintains that assessment in education can be thought of as occurring “whenever one person...is conscious of obtaining and interpreting information about the knowledge and understanding, or abilities

and attitudes of the other person.” So in this interpretation assessment is seen as a process often by assigning some value to it and its purpose is gathering of information which is then interpreted. Anderson (2003:177) sees assessment as “the process of gathering and interpreting information to aid in classroom decision making.” In this case the purpose of assessment is extended beyond gathering of information and includes a formative or diagnostic element. Hattingh (2005) understands assessment as a structured process for gathering and weighing evidence about an individual’s achievements in relation to specified learning outcomes, in order to determine whether he/she has demonstrated competence. The evidence may come from various sources, in different forms, such as, projects, tasks or tests, as well as from various people, educators, parents, peers or self.

This evidence is used for making decisions about the achievement or non-achievement of pre-determined assessment standards. In this interpretation the notion of weighing or measurement of competence has been inserted into the meaning of assessment. Information may thus be collected in various forms, from various sources and assessment may or may not involve numerical measurement.

Satterly (1981:1) for example, bases his interpretation of assessment on the Latin verb *assidere* which means “to sit beside.” In this instance assessment is portrayed as the intimate, supportive involvement of the assessor in the progress and development of the learner. As Satterly explains such an approach to assessment is experienced positively by the learner as she comes to know the teacher as a caring, humane person whose purpose is to understand what she lacks in specific areas and to assist her to improve it. Assessment purposes can be broadly classified as either formative or summative, but assessment is not always exclusively formative or summative as each can entail elements of the other in different types of assessment. Formative assessment is designed to be diagnostic, supportive, aid self-

understanding or to identify barriers to learning, but the same information can also be used summatively.

Summative assessment is used for various purposes; to evaluate in relation to an assessment standard, criterion or norm. The purpose of summative assessment may be to classify for placement or promotion to next grade, to make decisions for intervention or to evaluate the quality of teaching. Based on the insights of the authors mentioned above, I deduce that generally the meanings of assessment in education can be summarised as follows:

- Assessment is the means we use in schools to gather information from various sources on how much our learners have learnt and to identify the barriers to learning.
- Assessment refers to a variety of ways used by various assessors to collect evidence about learners.
- Assessment may or may not involve numerical measurement which is possibly only in the case of that which can be measured and quantified.

An important consideration that must be taken into account in respect of assessment is; information that would count as evidence of learning must be collected. Questions that might be helpful to ask in respect of the collection of evidence are:

- Does it provide information about the values that the learner has learnt?
- Do various assessors use a variety of ways to collect evidence of values knowledge of learners?
- Does assessment of values provide reliable and valid information that can be measured to show progress in the internalization of values by learners?

Assessment of values might be helpful if it could provide evidence of learning, in the same way in which assessment of knowledge and skills are able to provide it. If we consider rational responses to the above questions, it seems unlikely that evidence of values learning can be collected in the same way as other categories of knowledge. This situation brings the desirability of assessing values in schools into question. The implications for the assessment of values as pointed out by Mouton (1996) and Kaplan (1964) are that while assessment usually involves collecting evidence of some sort which may not necessarily require measurement; measurement involves quantification.

### **5.3.2 INTERNATIONAL PRACTICES REGARDING THE TEACHING AND ASSESSMENT OF VALUES**

Assuming that it is possible to assess and even perhaps measure values how might this be done? In Australia, school syllabuses include statements of the values and attitudes which teachers are expected to teach. Core values such as honesty and respect have been identified as generally acceptable by the educational community. A not untypical piece of advice to teachers in Australia is the following:

Values and attitude outcomes, although forming an integral component of the syllabus and teaching program, are not included when determining students' level of achievement in relation to knowledge and skills outcomes. Student attainment relative to the values and attitude outcomes should, nevertheless be observed and reported in its own right, as appropriate. (NSWBOS, 1999c: 40).

So while the assessment of values is a requirement, it is not included when determining final marks (codes or percentages.) Nothing further is included about how teachers might approach the assessment of values and attitudes.

A symposium on the assessment of values was presented by ACER officers at a conference presented by the Australian Association for Research in Education. Presentations at this symposium reflected unease about the

assessment of values according to Forster (2001). New South Wales syllabi generally include advice to teachers as to how they should assess the student learning outcomes which are outlined in the syllabi. But according to Forster, an examination of the New South Wales syllabi guidelines similarly shows unease and uncertainty on the part of the curriculum authorities as to how to approach the assessment of values and attitudes.

Examination of documents of the Curriculum Planning and Development Division of the Ministry of Education of Singapore (2000) reveals support for the assessment of moral development. These documents state that as the social and moral development of a child contributes to the building of a balanced individual, schools need to assess how much and how well a child has learnt through the Civics and Moral Education programme. Teachers are once again not given direct instruction as to how this assessment should be conducted as the document indicates that to measure pupils' learning in Civics and Moral Education in terms of knowledge, skills and attitudes teachers are given the discretion to decide on their own modes of assessment. The ultimate assessment, remains whether pupils demonstrate moral behaviour in their daily life at home, in school and in the community. How evidence will be collected to determine whether pupils have achieved such consistent moral behaviour in their daily lives however remains unclear.

In a paper presented at the 7<sup>th</sup> National Conference of the International Association for Cognitive Education (2006) in Southern Africa, Dr. Tay-Koay Siew Luan from the Ministry of Education in Singapore referred to the need for innovative modes of assessment to grade students' learning of values. There seems to be some acknowledgement from Singapore's education authorities that new modes of assessment will enable teachers to better reflect what students can do to demonstrate their development and growth in values acquisition. In spite of common reservations about the assessment of values, this is undeniably a positive development as it signifies

an attempt to acknowledge that current modes of assessment of values education may be inadequate.

Recently there has been an upsurge in interest in “multiple intelligences.” These are divided into three broad areas:

- Intelligence quotient- IQ rational intelligence-what I think
- Emotional intelligence quotient- EQ-what I feel
- Spiritual intelligence quotient-SQ- What I am

Zohar and Marshall (2004: 4-5) have a simple definition of IQ as “intelligence with which we think” and hold that our intellectual or rational intelligence is what we use to solve logical and strategic problems. “Emotional intelligence is the subset of social intelligence that involves the ability to monitor one’s own and other’s feelings and actions, to discriminate among them and to use this information to guide one’s thinking and actions” (Prati, Douglas, Ferris, Ammeter & Buckley, 2003: 22). Another definition is emotional maturity to manage our inner energy and power. “EQ is the intelligence with which we feel.” (Zohar & Marshall, 2004: 4-5). Spiritual intelligence is the ability to access and live our deepest meanings, values, purposes and highest motivations. It transcends dogmas, religions, traditions and rituals and is the essence of our being, the core of a person’s identity, their being and doing (Zohar & Marshall, 2004). If values are located in the sphere of spiritual intelligence it is surely difficult if not impossible to score, rank or measure them in the same way as other forms of knowledge.

There appears to be strong general agreement that schools can and should *teach* positive values that will contribute to the social and moral development of a balanced child who will be able to participate in society as a critical-democratic citizen. However the *assessment and measurement* of values internationally seems to be fraught with uncertainty, lack of clarity on whether it should be done, as well as uncertainty about how it could be done.

Curriculum authorities in South Africa conversely appear to believe that values can be assessed and measured. So it is important to explore the assessment of values from the South African perspective to see how this is done.

## **5.4 THE ASSESSMENT OF VALUES IN THE CURRICULUM**

### **5.4.1 GENERAL ASSESSMENT PRINCIPLES**

As I have explained in chapter 2 assessment is understood to be integrated, outcomes-based (criterion-referenced), based on demonstrable and integrated competences of which there is concrete evidence, varied in nature and conceptualised as an essential part of teaching. All of these principles have implications for the assessment of values.

### **5.4.2 INTEGRATION**

An integrated curriculum as described by Bernstein (1996) tends to emphasize procedural knowledge and the assessment of demonstrable competences. The rationale behind this according to Mason (1997) is that the intellectual currents of the day stress the practical use or “performativity” of knowledge.

In the past the over emphasis on propositional knowledge in the pre-OBE curriculum produced rote learning. The strong emphasis on procedural knowledge in the current curriculum may similarly have unintended consequences for education. For example, a brilliant scientist may have both the propositional knowledge and procedural competence to manufacture a lethal bomb but without values knowledge she/he will not know or care to use this knowledge in morally correct ways.

Tibbutts (1995) in support of this view has pointed out the need to focus not only on the rationalist knowledge contents of human rights, but also on accompanying values and attitudes. While it is widely acknowledged that values education must mediate certain information or rationalist knowledge, it also needs to mediate the capacity to make reasoned judgements Lipman (1991) and to promote the personal and group adoption of democratic values Reardon (1997). The decision to do so involves the will and emotions which may be what Osler and Starkey (1996) refer to as the affective dimension. Lipman believes that moral education requires a cognitive element; the ability to exercise good judgement and this does not develop from merely knowing about values. Reardon (1995; 1997) argues that:

... the moral dimensions of human rights are crucial to an appreciation of human rights, and that education in, and of values, are crucial for the preservation and development of human rights, including those in schools.

The operational competence which is the focus of OBE should be integrated, applied competence (The Report of the Review Committee of C2005, DoE 2000). According to Hattingh (2005) applied competence means the ability to engage in appropriate practices (practical competence) to understand the theoretical bases for these practices (foundational competence) and reflect on and improve such practices (reflexive competence).

The notion of integrated assessment places emphasis on the process of assessment: solving problems, developing interpretive and reflective competences, responding to and evaluating new ideas, appreciation of art and the aesthetic beauty of nature, questioning shaky assumptions and reflecting on alternatives. Assessment tasks are theme related, problem-based and integrate learning areas as they are not insulated from each other (Hattingh 2005).



It is fairly obvious to see the important role that propositional knowledge plays in terms of integrated assessment. Yet the focus of the curriculum strangely, is on procedural knowledge, demonstrable competence or observable competences. Considering that the approach to assessment, according to OBE principles should be holistic and that the emphasis is on demonstrable competences that can be seen and measured (The Report of the Review Committee of C2005, DoE 2000) how do educators provide evidence to support the assessment of those competences such as creativity, insight, aesthetic appreciation, and the conative dimension of values, attitudes and dispositions that are implicit in and constitutive of the processes of educative learning, but cannot be directly or indirectly seen or measured? How can evidence be provided that these considerations have been taken into account in the process of holistic assessment?

Bernstein has pointed out how different constructions of the curriculum, as collection or integrated types, impact on the kind of knowledge that it favours. Stenhouse (1975) has demonstrated that policy and practice do not always align. Carrim and Keet (2005) have argued that only a conception of human rights in terms of propositional and procedural knowledge will fit into the OBE assessment framework.

Feinberg and Soltis (1992) suggest that the meaning of curriculum is not fixed and unchanging. Instead they argue that its meaning can only emerge through interpretation. It appears that curriculum theorists in South Africa, who prioritised procedural knowledge, did not fully consider or critically engage with the complexities regarding interpretation of different types of curricula, the kind of knowledge that it prioritises and the implications that the integration of curricular content has for values education. I conclude that presently the notion of an integrated curriculum, the need for assessment standards in operational terms, ways of collecting evidence of moral learning, the measurement of values, the emphasis on demonstrable competence and

integrated competence create tensions in the relationship between South Africa's OBE curriculum and the assessment of values.

#### **5.4.3 CRITERION REFERENCED ASSESSMENT**

Within the old norm-referenced assessment model the key message delivered about attainment is one of comparison or ranking between the abilities of individual learners and that of the class. As Gultig (1999) explains a learner's individual performance was compared with a norm such as a class average mark and assessment was mostly used summatively at the end of a course or year.

The introduction of the new OBE curriculum resulted in major changes in assessment; from the old input-based, norm-referenced, summative assessment model, to a new outcomes-based, criterion-referenced, continuous assessment model (Lubisi, Parker & Wedekind, 1998) which included the assessment of values. Gultig (1999:19) holds that: "A learner's performance will be evaluated against a set of criteria, rather than against a class average which reflects the performances of others." The key message of the new model was the importance of measuring whether a given outcome or assessment standard had been achieved. The curriculum specifies assessment standards and criteria for knowledge, skills and values that are derived from the critical and developmental outcomes for each learning area.

The curriculum assists teachers to assess learners by placing assessment standards at the heart of the assessment of every grade. The assessment standards describe the level at which learners in each grade should demonstrate their achievement of the learning outcomes. According to the Report of the Review Committee on Curriculum 2005 (DoE 2000:3) this means "that the teacher has a clear understanding of exactly what needs to be assessed for each learner in each grade in terms of knowledge, content and skills." There is unfortunately no explicit mention of values in this statement

as it refers to knowledge, content and skills. I am not sure if this is a technical error but I assume that “content” ought to be replaced by “values.”

This assessment model implies the need for assessment standards and criteria for values. In the original criterion-referenced assessment model, assessment is carried out in relation to clearly defined learning outcomes, assessment standards and assessment criteria, specific outcomes, range statements and performance indicators some of which are no longer features of the revised curriculum. The Report of the Review Committee on Curriculum 2005 (DoE 2000:3) states that: “assessment criteria are no longer a feature of the curriculum,” yet in the same document on page 8 it is stated that: “assessment should be based on pre-determined criteria or standards.” This suggests a number of possibilities for example, that educators should determine the criteria for themselves as these are no longer specified or that criteria are no longer necessary.

Furthermore in the same document on page 52 it states the following in respect of the assessment principles of OBE:

It requires clearly-defined criteria and a variety of appropriate strategies to enable teachers to give constructive feedback to learners and to report to parents, and other interested people.

Ambiguity tends to obscure facts and can lead to false assumptions. I assume that assessment criteria remain central, so I will continue to refer to these in this study.

Assessment standards indicate the level at which learning outcomes should be assessed. An assessment standard usually contains a verb for example: learners are able to *appreciate* the rights and responsibilities of children. The question is what would be the assessment criteria according to which this learning outcome could be assessed? Learners could be taught about social norms, the laws of the country and the rights of others and written tasks could

be prepared to assess propositional knowledge. Assessment of these tasks is possible by specifying the relevant assessment standards and criteria and, if met, learners will be pronounced competent. Learners could also be taught how to make decisions in accordance with social norms and to access legal rights. Assessment of procedural knowledge could probably be done through observation or a list of instructions to follow or even a checklist. But in the case of assessing the *appreciation* of rights and responsibilities, how this should be done is not clear.

Attempts to describe learning outcomes and assessment standards and assessment criteria for values are illuminating. The first principle for assessment according to Pahad (1997) is to be clear about what should be assessed that is, what learners would be required to do by way of demonstrating that they have met the specified learning outcomes and assessment standards and competences. An illustration of this problem is provided by Mehrens and Lehmann (1978) who cite as an example the attempt by Fraenkel (1972) to specify the assessable behaviour which would demonstrate that a learner has met the assessment standard: learners are able to appreciate and respect the dignity and worth of others as follows:

- wait till others have finished before speaking;
- encourage others involved in a discussion to offer opinions;
- revise opinions in the light of others
- remain open to the opinion of others no matter what their social status

Following Pahad the first step in assessment is to be clear about what is being assessed, then to describe attainment in operational terms. Firstly, what does it mean to appreciate the dignity and worth of others? One possibility is that it could mean *to understand* the dignity and worth of others, in which case knowledge could be assessed. Another possibility is to assess behavioural skills as Fraenkel suggests. Furthermore if it is not worded in operational terms then it is not a measurable outcome as it is not clear how learners can

demonstrate that they appreciate the dignity and worth of others. It is also not clear what will count as evidence and how evidence can be collected?

Also lack of specific assessment standards may be confusing for example; waiting your turn to speak may be regarded as a social skill. Even revising opinions may not be an example of the value of openness. It could be a reasoning process to indoctrinate/ outsmart/ influence opinions, so that there may not necessarily be a moral intention to it. So, these may be assessment standards for knowledge about the dignity and worth of others and making decisions about it, but not about really appreciating and respecting the dignity and worth of others. What this example illustrates is that learning outcomes and assessment standards for knowledge about values can be confused with valuing values. What can be assessed in this example are acts of social skills, but the appreciation of the dignity and worth of others is not necessarily being assessed.

#### **5.4.4 DEMONSTRABLE COMPETENCE AND ITS IMPLICATIONS FOR THE ASSESSMENT OF VALUES**

Competence is a contested concept that has different implications for different ways of knowing. In South Africa rival notions of competence have dominated the assessment debate namely academic competence or operational competence. Barnett (1994:71) maintains that

... there can be no objection in principle to the application of the term competence to educational assessment as it is generally agreed that society desires and needs competent people.

But he points out that the notion of competence becomes problematic when competence becomes a dominant outcome, that obscures other worthwhile outcomes, and when competence is over-narrowly construed. Barnett makes two points that are important for how competence is interpreted; firstly, that all educational programmes for instance, engineering or social work have

broader aims than just the development of academic or operational competences and secondly, that competence can be too narrowly construed in terms of behaviourism.

An analysis of the specific and developmental outcomes listed for all learning areas reveals that assessment standards generally refer to what “learners must be able to do” (demonstrate). What is required is usually indicated by a verb or task word for example; identify, show, understand, or write. In terms of how learning outcomes and assessment standards are framed within the curriculum, it is evident that it leans towards an interpretation of competence as demonstrable competence (The Report of the Review Committee of C2005, DoE 2000). What are the implications for values education, of interpreting competence in terms of demonstrable competence?

The framework provided by Ryle, as described in chapter 3 demonstrates that interpretations of competence are related to different ways of knowing. If values education is positioned in terms of “knowing about” values then competence becomes construed in one way. If competence is construed in terms of “how to” its focus becomes demonstrable competence. (Surely common sense requires one to have propositional knowledge whether vertical or horizontal before you can use it to perform tasks?)

If competence is construed in terms of “to be” or acting in accordance with positive values, the notion of competence becomes problematic if not a logical impossibility. Jessup (1991:72) articulates this dilemma in this way: “If you cannot say what you require, how can you develop it, demonstrate it and know when you have achieved it?” For example learning outcomes in operational terms would be needed. These would need task words such as to be compassionate or to be honest. What would be the assessment criteria and what would count as evidence of having met the assessment standards? How would evidence be collected? Which instrument could measure changes in behaviour and the internalization of a particular value? These are the

seemingly unexamined and as yet, unanswered questions that arise for the assessment of values when competence is construed in terms of demonstrable competence.

Assuming that it is possible to construe competence in values in terms of demonstrable competence what would this mean? Competence in terms of values means exercising the will to act in positive ways for example, to be honest. So, while one can teach about honesty in many ways and while it can be encouraged through continuous mediation, learners need to be willing to participate in a process of educating, through training and practise, the will to be honest.

As I understand it, this process refers to the development of a moral conscience; that conative human faculty that enables willing human beings to discern between right and wrong especially in the way they conduct themselves. What this seems to suggest is that developing moral consciousness and the acquisition of moral learning is a lengthy process that in some cases is never even fully completed. I conclude that competence is a difficult concept that lends itself to different interpretations each of which has consequences for the assessment of values. Christie (1997:65) has drawn attention to the constraints of the competence debate and warns that:

... without careful attention to implementation procedures, it is doubtful whether curriculum planners and teachers will have a sufficiently broad understanding of the complexities of competence debates ...

#### **5.4.5 EVIDENCE OF COMPETENCE**

The curriculum describes assessment in relation to the collection of evidence of learning. According to the Teacher's Guide for the Development of Learning Programmes: Policy Guidelines for Life Orientation (DoE 2003:24): "Values and attitudes are difficult to assess because they refer to

internal states that are closely linked with emotions.” This mode of operation is confirmed by the Teacher’s Guide for the Development of Learning Programmes: Policy Guidelines for Life Orientation (DoE, 2003:24) which states:

From the learner’s external actions and behaviours one can infer his/her internal state. For instance, if a learner responds to a conflict situation in a positive way by smiling, the teacher (assessor) can infer that the learner shows patience, tolerance and respect.

The same Teacher’s Guide document under the heading “How to assess values and attitudes” recommends that the following methods be used: observations, both informal and formal, questionnaires/surveys, role-plays, reflection worksheets, presentations, journal entries and debates. It further states that “when assessing values and attitudes the teacher has to measure changes in behaviour over time” (DoE 2003: 24). Several issues arise from these guidelines. Firstly, it is important to note that the policy document recommends that it is changes in behaviour that must be measured.

I have earlier established that behaviour is not necessarily a reliable indicator of the internalisation of values. I have also pointed out that forms of behaviour may be exhibited merely to gain rewards. Secondly, the notion of measurement of changes in behaviour is problematic. What would count as evidence of changes of behaviour? How could evidence of changes in behaviour be collected? Which instrument could be used to measure such changes? It is unlikely that the assessment instruments recommended in the policy document are able to measure changes in behaviour. Furthermore learners are required to act morally in many varied situations at school, on sport fields, at home, with friends, and also in conflict situations outside the classroom. This means that changes in behaviour need to be assessed and measured in various contexts, in a variety of ways and by various people and collecting evidence of this may be extremely difficult if not impossible to obtain.



Something else that might have been considered by the designers of the curriculum as a strategy to assess values is what Peters (1958:1-16) has referred to as “his reasons” explanations. These explanations are in terms of the reasons agents provide for their actions within the framework of social norms, conventions and rules of a society, but this does not imply that you will be directly asking “what are your values” but that you would ask “why did you behave in this way?”

This approach fits Kohlberg’s way of understanding moral development and reasoning about moral concerns. So Peters regards ‘his reasons’ explanations as the basic form of explanation for human actions. He suggests that if you want to know why people behave in specific ways, you must *ask* them. But even this bold approach does not guarantee an honest indication of the extent to which values have been internalised, because what a respondent says are his reasons, may or may not be his real reasons. No learner is bound to admit that she does not appreciate the worth and dignity of others, so her responses could be dishonest, thus bringing reliability and validity of assessment in doubt. Furthermore acts that imply certain values may be misleading as Fraenkel’s (1972) attempt to define assessable behaviour has demonstrated.

So if policy guidelines prescribe the assessment and measurement of changes in behaviour and not of values, then there might be some element of truth in the criticism that the curriculum is trapped in behavioural principles as suggested in the earlier section: Values Education Policy Initiatives. Moreover if there is confusion about behaviours that imply certain values and the internalisation of values, and if there is no clear indication as to how changes in behaviour can be measured, how evidence of such changes is to be collected or which instrument to use to determine this, the question is, what do educators currently assess and measure when they claim to be assessing and measuring values?

#### 5.4.6 ASSESSMENT AS A TEACHING TOOL

The technical interrelatedness of curriculum and assessment in the NCS can be summarised in the following way:

- The curriculum builds on the vision of the Constitution and C2005.
- The critical and developmental outcomes are a list of outcomes derived from the Constitution—contained in the South African Qualifications Act (1995)
- Learning area statements are derived from the critical and developmental outcomes
- Assessment standards are derived from learning area outcomes,
- Assessment criteria are derived from assessment standards
- Assessment tasks are planned in accordance with assessment standards and criteria

Technically a close link between assessment and the curriculum outcomes has been maintained and it is assumed that assessment can take place in accordance with the outcomes and guidelines of the curriculum. Documents relating to assessment policies in South Africa indicate that appropriate assessment practices are considered to be essential for the successful implementation of C2005 (National Protocol on Assessment DoE, 2005). Teaching, learning and assessment within OBE are considered to be so closely related in the classroom that they are often not separable into distinct activities. The general intention is therefore that teaching, learning and assessment should be *linked*, an idea that was not consistently acknowledged in the past. The Assessment Policy in the General Education and Training Phase: Grades R-9 (DoE, 1998) states even stronger that teaching, learning and assessment should be *inextricably* linked. In OBE assessment activities (formative and diagnostic assessment) provide opportunities for *teaching and*

*learning* as barriers to learning are revealed and teaching can be structured in a way to address these.

The question is can the assessment of values provide answers to the questions I posed earlier in the chapter regarding the collection of evidence of values learning? If we take on board Mouton's (1996) suggestion of assessment of acts that imply positive values, then it is possible to identify acts of undesirable behaviour. As I have indicated in chapter four there are several approaches available to teach positive values, but no amount of teaching will necessarily improve the acquisition of positive values unless there is a willingness on the part of learners to do so.


Psychology has traditionally identified three components of mind; cognition, affect and conation Huitt (1999.) Conation refers to the connection of knowledge and affect to behaviour and is closely associated with the concept of volition, defined as the use of the will, or the freedom to make choices about what to do Kane (1985.) Researchers such as Huitt (1996), Kane, (1985) and Bandura (1997) believe that volition, or will, or freedom of choice, is an essential element of human behaviour and suggest that conation is especially important when addressing issues of human learning. The study of conation is intertwined with the study of cognition, emotion and behaviour and often difficult to separate, but conative components are often considered when assessing cognitive operations (Snow, 1989).

Huitt (1999) suggests that volition ought to be the cornerstone of the study of human behaviour especially in an increasingly chaotic social and cultural milieu. He argues that if the restraints of widely accepted social mores, values and beliefs are lacking, individual choice becomes the chief protection against moral and social degradation for it is this conative element: the will, volition, motivation or individual choice that determines the moral actions of people and I suspect that this component of the human mind would be difficult if not impossible to measure.

At the level of policy it is assumed that teaching, learning and assessment are interrelated and that assessment activities should teach. While this is possible in respect of knowledge and skills it provides a challenge for values. I conclude that the assessment of values is complex; whether it is to assess acts that imply certain values or the measurement of such values. It embodies complex social, philosophical, psychological, moral and educational considerations. Clearly the concepts of “assessment” and “measurement” as they relate to values are more complex than what was perhaps initially anticipated.

## **5.5 CURRICULUM GUIDELINES FOR THE ASSESSMENT OF VALUES**

In terms of assessment strategies, the following guidelines are provided for Life Orientation in a policy document entitled: Revised National Curriculum Statement Grades R-9, (Schools) Overview (2002: 54):



The choice of what assessment strategies to use is a subjective one, unique to each teacher, grade and school, and dependent on the teacher’s professional judgement. The methods chosen for assessment activities must be appropriate to the Assessment Standards to be assessed and the purpose of assessment must be clearly understood... Competence can be demonstrated in a number of ways. Thus a variety of methods is needed to give learners the opportunity to demonstrate their abilities more fully.

These guidelines imply two possibilities: that educators have been given freedom to be innovative and creative in terms of choices of assessment strategies or uncertainty about guidelines for the assessment of values as has been the case in other countries. A Teacher’s Guide for the Development of Learning Programmes Policy Guidelines Life Orientation (DoE, 2003: 24) provides the following advice pertaining to the assessment of values: “Values and attitudes are difficult to assess because they refer to internal

states that are closely linked with emotions .... From the learner's external actions and behaviours one can infer his/her internal state.”

While values are linked with emotions as Nussbaum (2001) has shown, values are not emotions, but refer to conative qualities; decisions, based on the will to act which may be influenced by emotions but exercised by rational thought. The latter part of these guidelines is premised on a flawed assumption about a linear relationship between moral judgement and moral action. Tödt (1999) identifies six aspects of moral decision-making:

- seeing, accepting and describing the problem
- analysing the problem considering possible available responses
- evaluating applicable norms and criteria
- listening to the opinion of others
- taking the decision and
- acting in accordance with it

Moral decision making is a process and there is not necessarily a conceptual relationship between moral judgements, internal states and external actions (behaviour) as moral judgements do not always translate and culminate into moral action as Papalia et al (1978:284) have pointed out. Behaviour is not a true reflection of the internalisation of values, as positive behaviour could be displayed merely as a means of receiving rewards.

In terms of what would count as evidence of moral learning and how such evidence could be collected, guidelines in the document A Teacher's Guide for the Development of Learning Programmes Policy Guidelines Life Orientation (DoE, 2003: 24) advises that:

A wide range of assessment strategies may be used to measure learner performance. Teachers can select these depending on the purpose of assessment. The forms/types chosen must provide a

range of opportunities for learners to demonstrate attainment of knowledge, skills, values and attitudes.

The following are some of the various forms of assessment suggested in The Teacher's Guide for the Development of Learning Programmes Policy Guidelines for Life Orientation Grades R-9 ( DoE 2003: 25) that could be used by the teachers to assess values:

Action research

Alternative response questions (identification, selection)

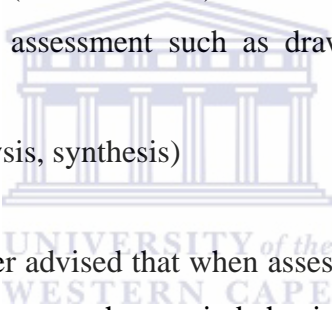
Debates (communication skills)

Matching objects (understanding, or the ability to weigh up options or to discriminate)

Projects or role play (demonstration)

Performance based assessment such as drawings, paintings recitals (presentations)

Written work (analysis, synthesis)



Educators are further advised that when assessing values and attitudes the teacher has to measure changes in behaviour over a period of time. The following assessment instruments are suggested: observations, questionnaires, reflection worksheets, role plays, presentations, debate and journal entries (A Teacher's Guide for the Development of Learning Programmes Policy Guidelines Life Orientation (DoE, 2003: 24).

Bloom (1964) Coltham and Fines (1971) and Cagne (1970) propose taxonomies consisting of six levels: knowledge, comprehension, application, analysis, synthesis and evaluation. The point is that different ways of teaching according to these taxonomies may result in different outcomes. For example; teaching for memory is related to teaching for knowledge and comprehension; teaching for analytical thinking, to teaching for analysis and

evaluation; teaching for creative thinking, to teaching for synthesis; and teaching for practical thinking, to teaching for application.

The implication of this is that whilst it is assumed that these guidelines (A Teacher's Guide for the Development of Learning Programmes Policy Guidelines Life Orientation (DoE, 2003: 24) are guidelines for the assessment of values, they are in fact guidelines for the assessment of knowledge and skills as the taxonomies demonstrate. It is of course entirely possible that several cognitive outcomes may result from the critical and developmental outcomes, but these do not explicitly make provision for outcomes for values. The point is that the ways in which the critical and developmental outcomes are framed are appropriate for the assessment of cognitive abilities but not conative qualities as the taxonomies show. Snow (1989) has explained, that cognitive qualities are often intertwined with conative qualities, and one difficulty would be to separate these in terms of cognitive and conative qualities in order to assess values. So Mouton's notion of assessment of acts that imply values, Kaplan's notion of values as theoretical constructs that cannot be measured, as well as Huitt's notion of conation, may strongly challenge the assessment of values.

The policy guidelines offered for the assessment of values reveal conceptual misunderstanding and confusion of what constitutes values, the distinction between values and behaviour, the forms of assessment to be used as well as the assessment instruments to be used for the assessment of values. This confirms the findings of The Report of the Review Committee on C2005, Life Orientation Overview (2002:14) which indicates that "the assessment of values is the most neglected element of curriculum policy in South Africa." Based on the policy guidelines offered to educators in respect of the assessment of values, the need for a coherent policy document on the assessment of values containing clear guidelines on processes and procedures is obvious.

## 5.6 EDUCATORS' PROFESSIONAL JUDGEMENT IN THE ASSESSMENT OF VALUES

All assessments in education ultimately rest on the professional judgement of educators. The Norms and Standards for Educators (Government Gazette 20844, 2000), spells out the role of the educator as assessor in the following way:

The educator will understand that assessment is an essential feature of the teaching and learning process and know how to integrate it into this process. The educator will have an understanding of the purposes, methods and effects of assessment and be able to provide helpful feedback to learners ....

Outcomes-based education is a way of teaching and learning which makes it clear what learners are expected to achieve. The teacher's role is to teach in order to help learners to satisfy the requirements of the assessment standards in the curriculum. Assessment is essential to outcomes-based education because it must be possible to assess when a learner has achieved what is required in each grade. Guidelines for the professional judgement of educators in the assessment of values have been provided in a policy document entitled A Teacher's Guide for the Development of Learning Programmes Policy Guidelines: Life Orientation (DoE, 2003) The guidelines are geared to assist teachers in accommodating Learning Outcomes and Assessment Standards that are pre-scribed, yet create space and possibilities for the use of judgements and insights based on particular contexts and a diverse learner population.

The professional judgement of educators, as The Norms and Standards for Educators (Government Gazette 20844, 2000) document indicates, is a key element for the assessment of knowledge, skills and values in OBE. As Bussis, Chittenden and Amarel (1976) point out: decision-



making is invariably a subjective, human activity involving value judgements based on whatever evidence is available.

What does it entail for educators to exercise their professional judgement in the assessment of values education? As Schon (1983) puts it, professional action involves making discretionary judgements in situations of unavoidable uncertainty (lack of evidence). Decisions about the teaching and assessment of values embody complex social, philosophical and psychological expertise and knowledge as the literature indicates. This requires that educators should have a sound professional knowledge base and be well versed in all of the theories and debates that inform moral learning and assessment of values.

I have earlier pointed out the assumptions about the role of educators as assessors contained in The Norms and Standards for Educators policy document. The Report of the Review Committee of C2005 (May, 2000: 19) has identified the “insufficient attention paid to assessment in training” as a major concern. The Report of the President’s Education Initiative Research Project (1999:202) states “studies indicate that the assessment skills of many teachers are rudimentary-to say the least” and it concludes that “research results indicate that the more sophisticated forms of assessment advocated in the new curriculum, are well beyond the reach of the majority of teachers at this stage.” Clearly there is confusion about the abilities and capabilities of educators as assessors in the policy documents and reports.

While some people do use informal judgements in everyday life, one can only conclude that to assume that educators will know and understand how to assess values, particularly in the absence of evidence and guidelines that are informed by theories of learning and moral acquisition is presumptions.

## 5.7 CONCLUSION

My overall conclusion based on this chapter, is that a particular conceptual understanding of the nature of values and values knowledge may determine whether it could/ could not be assessed by the same assessment standards as for knowledge and skills. If the assessment of values is conceptualised in terms of knowledge about values, there are possibilities for assessment. But if values knowledge is conceptualised in terms of valuing or as Ryle puts it “to be” then we are faced with many challenges in respect of the assessment of values.

The list of values prescribed in the Manifesto may be considered as learning outcomes for example: “teaching learners to be tolerant” but not as assessment standards. The idea was that these values should be infused in the learning outcomes and assessment standards for knowledge and skills. While some of the values mentioned could be implicit in some learning areas, for example Literature, Social Sciences, Arts and Culture we would still need assessment standards for these values if they are to be assessed. For instance multilingualism is one of the values mentioned, but, how from a practical point of view, would it be assessed given the fact that in many schools mother tongue instruction and one additional language is taught?

An analysis of the critical and developmental outcomes which form the basis for learning outcomes and assessment standards contained in the curriculum reveals that these focus on cognition. The assessment standards for assessing cognition which refer to knowledge about values can logically not be the same as assessing the will to act in accordance with positive values which refers to conation.

Despite some differences, there seems to be general agreement that schools should transfer positive values to their learners, but the assessment and measurement of values remains highly debatable. While it may be possible to

assess acts that imply certain values as people do in everyday life, these are usually subjective judgements. Furthermore, it is logically impossible for educators to have access to all the social contexts where learners are required to act morally. I conclude that it is not possible for educators and perhaps for anyone, to assess or measure values with precision. My conclusion resonates with Aristotle's (1947) belief that it is the mark of an educated man and a proof of his culture, that in every subject, he looks for only as much precision as its nature permits.



## **CHAPTER SIX**

### **METHODOLOGY OF THE EMPIRICAL CASE STUDY**

#### **6.1 INTRODUCTION**

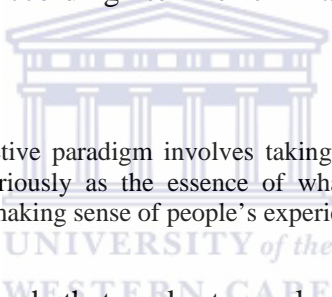
The aim of the case study was to provide one perspective of how a group of Foundation Phase educators currently engaged with the teaching and assessment of values in their classes, and to present it as an additional perspective to be located within the broad framework of this study. The case study presents a practice on the ground perspective of the teaching and assessment of values within an Outcomes-based curriculum in a specific educational context and is one of many possible ways in which the curriculum may be interpreted. It illustrates but does not exemplify how a group of Foundation Phase educators engage with the teaching and assessment of values in a specific context. My intention was for it to be seen as a “case study within the study” or what Fay (1975) has referred to as ‘wider and wider circles of explanations’ of the same topic.

In this chapter I present the research methodology of the empirical dimension of the study. I used a combination of quantitative and qualitative approaches to collect different kinds of data from different sources. In this respect the case study replicates in miniature the overall design of the study: to engage different perspectives from various sources and disciplines. While most of the data were collected through qualitative research methodologies such as personal interviews and group discussions, questionnaires were used to obtain numerical data.

## 6.2 RESEARCH PARADIGM

As indicated in chapter 1, this study adopts a hermeneutic approach and is an attempt to explore and interpret the teaching and assessment of values within the framework of the curriculum from different perspectives, or in terms of Gadamer's (1977) concept of "the fusion of horizons."

It is evident from the literature that when selecting a research paradigm it is worth considering that boundaries between paradigms are often not as clear-cut as they are often assumed to be. Several writers have pointed out that interpretive and constructivist paradigms frequently transmute into each other and that the boundaries between these can become blurred (Denzin & Lincoln, 2003). According to Terre Blanche, Durrheim and Painter (2006:273)



... the interpretive paradigm involves taking people's subjective experiences seriously as the essence of what is real for them, (ontology), is making sense of people's experiences.

The research approach that seeks to analyse how signs and images have powers to create particular presentations of people and objects is known as constructivism. Social constructivist researchers want to show that thoughts and feelings which people assume are private are the result of systems of meanings that are socially constructed (Terreblanche et al, 2006). The key difference between these two paradigms is at the ontological level: different assumptions of how meaning is constructed; individually or socially. In respect of the teaching and assessment of values it seems likely that meaning can be constructed in both ways and I tried to show this in the thesis.

At the epistemological and methodological levels interpretive and constructivist approaches seem to converge, as both assume that the social world can only be accounted for in terms of meaning that actors ascribe to it, thus both draw on qualitative methods for data collection (Denzin & Lincoln,

2003). But some interpretive and constructivist researchers appear to have different perspectives of the role of language as a tool for constructing reality of the social world.

A qualitative interpretivist researcher would for example, by means of interviews try to determine how educators experience the teaching and assessment of values in positive and negative ways and what this means to them. A social constructivist researcher might trace the contours of the values discourse: the shared meanings and inter-subjective understandings that people have of values; and how the values discourse functions to construct a world in which a lack of values is seen as deviating from the norm. In this way values are treated as a discourse within which social life comes to be organised (Terreblanche et al. 2006). The implication of this is that different discourses may generate and ascribe different meanings to concepts. In this study I have explored the values discourses emanating from the perspectives of philosophy, psychology, curriculum and policy documents and the perspective emerging from practices on the ground. This is one way of identifying the commonalities and differences if any, between different values discourses pertaining to the teaching and assessment of values.

Such an approach provides not only commonplace, but “rich descriptions” of how actors construct their social realities; illuminating broader patterns of social meaning encoded in language and interpreting the social world as a kind of language. Stake (1995:102) maintains that “the constructivist approach helps a case study researcher justify lots of narrative description in the final report.” The case study was conducted within an interpretive/constructivist paradigm as this approach seemed to be most appropriate for a study that sought to understand the meanings actors have constructed within a particular practice.

### 6.3 QUALITATIVE RESEARCH

McMillan and Schumacher, (1993) define educational research as a disciplined and scientific inquiry to improve educational practice. Within social research the terms “quantitative” and “qualitative” are often used to distinguish between different approaches to educational research. The literature indicates that generally no approach depends solely on one method any more than it would exclude a method merely because it is labelled “qualitative” or “quantitative.” While it is true that some approaches may depend more heavily on one type of data-collecting method, it does not automatically exclude others. This is in line with the view of Scott (1996) who holds that although these methods are perceived to be distinct, there is increasing evidence which demonstrates that qualitative and quantitative research do not necessarily fit into separate paradigms hence they can be accommodated in the same research process.

A complex, interconnected web of terms, concepts and assumptions surrounds the term qualitative research as it crosscuts disciplines, fields and subject matter. Denzin and Lincoln (2003:3) therefore correctly describe the nature of qualitative research as: “a site of multiple methodologies and research practices.” Denzin and Lincoln (1978) highlight the diversity and variety of qualitative research methodologies and conclude that qualitative research privileges no single methodology over any other. Some of the methods and approaches that are included in the category of qualitative research are case studies, participatory inquiry, interviewing, participant observation and interpretive analysis.

It has become apparent from the literature that there are appropriate and less appropriate research approaches for research phenomena. Pretorius (1995:8) draws attention to this fact and points out that: “Research methods are not in themselves better or worse than others. The worth of a research method is not determined only by a particular method itself, but more importantly, by the

manner in which the method is used.” Mouton and Marais (1990:155-156) hold that in qualitative research the procedures are not as strictly formalised as in quantitative research; the scope is more likely to be undefined; and that a more philosophical mode of operation is adopted. Fortune and Reid (1999: 94) identify the following characteristics of qualitative research:

- The researcher attempts to gain a first-hand, holistic understanding of phenomena of interest by adopting a flexible strategy of problem formulation and data collection as the research proceeds.
- Methods such as participant observation and unstructured interviews are used to acquire an in-depth knowledge of how persons involved construct their social reality.
- Qualitative methodology rests on the assumption that valid understanding can be gained through accumulated knowledge acquired at first hand by a single researcher.

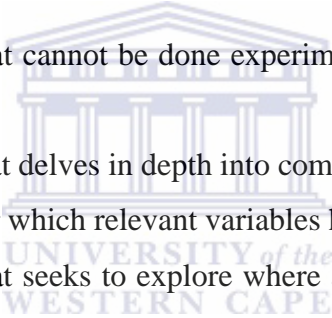
According to Dilthey (1976) the qualitative researcher is concerned with contextual understanding (*verstehen*) rather than explanation; observation rather than measurement; and the exploration of reality from the perspective of an insider as opposed to the outsider perspective of the quantitative paradigm. An insider perspective was accessed through interviews which recorded what educators said and through their portfolios which demonstrated what they did in their classrooms.

The strengths and weaknesses of qualitative research have been well documented by several authors. See for example Babbie & Mouton (2001), Denzin and Lincoln (1998), Miller and Salkind (2002). Interviews and focus group discussions as qualitative methods provide a useful means of understanding participants’ articulation of their personal experiences. Generally participants want to narrate such experiences. The openness of communication that it allows is considered as one of its strengths. Furthermore one is able to understand the dynamics of local contexts such as



how policies interface with the realities of classrooms through the experiences and narratives of those who are actively and intimately engaged with the process. The “thick” descriptions that emerge from qualitative research is a strength of this case study. One unavoidable weakness of this approach is the amount of data that needs to be collected, captured, categorised, analysed and stored. The possibility of losing data, of missing important points, of neglecting to write down something really important is ever present and this requires researchers to be vigilant at all times.

A qualitative approach was considered appropriate for this case study as it conforms to a number of the guidelines suggested by Marshall and Rossman (1999: 46), who write that a qualitative approach should be preferred for:

- 
- Research that cannot be done experimentally for ethical and practical reasons;
  - Research that delves in depth into complexities and processes;
  - Research for which relevant variables have yet to be identified;
  - Research that seeks to explore where and why policy and practice do not work;
  - Research on innovative programs.

Babbie and Mouton (2001:270) have identified the following characteristics of qualitative research which are appropriate for this case study:

- The natural setting of social actors is the site of research; the classrooms of educators, and discussions and findings that emerged from within these contexts;
- Insider view ; I gained access to the ways in which educators were engaging with the teaching and assessment of values in their classrooms;

- The objective is to generate “thick” or “rich” descriptions of actions and events; many views and numerous quotations from different voices are provided;
- The qualitative researcher is seen as the main instrument of data collection in the research process.

This research conformed to these characteristics in the following ways:

The site of this research was the natural setting of the participants. I gained access to their hearts and minds through conversations, interviews and the professional tasks that they had to produce. I collected evidence from the portfolios of educators in which their classroom practices in respect of the teaching and assessment of values were recorded. Maykut and Morehouse (1995:45) hold that “Qualitative researchers are interested in understanding people’s experience in context. The natural setting is the place where the researcher is most likely to discover, or uncover, what is to be known about the phenomenon of interest.” Babbie and Mouton (2001) suggest that qualitative research is especially appropriate as a means to study attitudes and behaviours of agents in their natural setting, as opposed to the artificial settings of experiments. Bromley (1986:23) writes that case studies by definition, “get as close to the subject of interest as they possibly can, partly by means of direct observation in natural settings, partly by their access to subjective factors (thoughts, feelings, attitudes, dispositions and desires) whereas experiments and surveys often use convenient derivative data such as tests....” The concept of “participant observation” usually denotes that subjects are researched in their natural settings.

I made conscious attempts to enter into the “hearts and minds” of these educators by “moving inside their classrooms as Babbie and Mouton (2001: 271) hold that the qualitative researcher should attempt to become more than just a disinterested observer.” I tried to familiarise myself with the everyday

lived realities of these educators in their classrooms to understand, as it were, their “way of life in their classrooms” and to put myself “in their shoes.” In this way I was able to present their insider views “what they say and do “on the teaching and assessment of values.

I provided thick descriptions of what participants said and did by allowing the reader to “hear” the voices of participants and to share and relive the experience of the situational context of the research as evidenced in the numerous quotations and the detailed descriptions in Chapter 7. Thick descriptions refer to rich descriptions of the particular nuances and dynamics that are evident in the way people live and narrate their real life experiences. It is for this reason that I present the findings of this case study in a narrative form.

Maykut and Morehouse (1995:46) with reference to the role of the researcher assert that: “While researchers are certainly pivotal in more traditional research approaches, the qualitative researcher has the added responsibility of being both the collector of data and the culler of meaning from that data, which most often is in the form of people’s words and actions.” Ethical considerations are important in any research particularly in view of the perception that researchers are considered the most important instruments of the research process. As the person involved in the teaching of the respondent participants I became a participant myself and I accept responsibility for the data presented in this case study as well as for the overall interpretation of different perspectives offered.

Hamel (1993: 23) observes, “the case study has basically been faulted for ... its lack of rigor in the collection, construction, and analysis of the empirical material. This lack of rigor is linked to the problem of bias...introduced by the subjectivity of the researcher.” I strongly believe that the promotion and nurturing of democratic values, the consideration of the common good of society and the will to embrace and live positive values have the potential to

transform schools and society. My belief may or may not be construed as a possible source of bias.

## **6.4 CASE STUDY RESEARCH**

### **THE CASE STUDY PROCESS**

The literature reveals that although case studies, especially qualitative case studies, are prevalent throughout the field of education, there appears to be different notions on what constitutes a case study. Yin (1994:13) for example defines case study in terms of the research process: “A case study is an empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident.” Stake (1994, 1995) focuses on trying to isolate the unit of study- the case. Merriam (1998:27) in agreement with Stake notes: “I have concluded that the single most defining characteristic of case study research lies in delimiting the object of study, the case.” Wolcott (1992: 36) sees a case study as “an end-product of field-oriented research.” According to Merriam (1998:27), Smith’s (1978) notion of “the case as a bounded system” and Stake’s (1995) understanding of the case as “an integrated system” come closest to illuminating what is definitive of case study research.

Case studies are differentiated from other types of qualitative research in that they are intensive descriptions and analyses of a single unit or bounded system (Smith, 1978). The most straightforward examples of bounded systems are those in which boundaries have common-sense obviousness, for example: a group of educators, a school curriculum, an educational policy, or an innovative educational programme. For the most part, the cases of interest in education and social science are people and programmes. Stake (1995:28) clarifies what constitutes a case as follows: “The case could be a child. It could be a classroom of children ... or professionals ... a case is one among

others ... the case is a specific complex functioning thing.” A case study is not attempting to predict what may happen in the future or to seek generalisations, but to understand how meaning is constructed in a particular setting; what it means for participants to be in that setting, and what the world or the phenomenon of interest looks like in that particular setting.

Because of the descriptive nature of case studies, a case study can illustrate the complexities of a situation and illuminate the fact that not one, but many factors contribute to it; a case study enables researchers to spell out differences of opinions about a situation; and a case study offers the means to obtain information from a wide variety of sources. Bromley (1986: 23) holds that: “case studies tend to spread the net for evidence widely whereas experiments and surveys have a narrow focus.” Merriam (1998:41) writes: “Case study has proven particularly useful for studying educational innovations, for evaluating programs, and for informing policy. Collins and Noblit (1978) note that the strength of case studies is that they reveal not static attributes, but understanding of humans as they engage in action and interaction within the contexts of situations and settings. Because of these strengths, case study is a particularly appealing design for fields of study such as education, as it generates contextual knowledge about educational processes, programmes and policies which is distinguishable from the abstract, formal knowledge derived from other research designs such as surveys. Because it is anchored in real-life situations, case study can play a significant role in expanding the knowledge base of education as a field of study.

The participants in this case study, were a group of in-service educators who attended lectures on the same module and who were all confronted with the same challenge; the teaching and assessment of values. So technically speaking, these educators only existed as a case when they were students in a lecture room, but they still qualify as a case on the grounds of being “a classroom of professionals” as Stake (1995: 28) has pointed out. Patton

(1985) explains case study research as an effort to understand situations in their uniqueness, as part of a particular context and the interactions that occur within that context. Yin (1994) raising another point about case study suggests that for “how” questions case study has a distinct advantage as it deals with process. Yin’s suggestion that case study is appropriate to research “how” questions, is applicable to this study which aimed to illustrate how a particular group of educators was teaching and assessing values. Shaw (1978:2) holds that case studies “concentrate attention on the way particular groups of people confront specific problems...” So if the arguments, explanations and suggestions of what constitutes a case as presented by Patton (1985), Yin (1994), Merriam (1998), Stake (1995) and Shaw (1978) are correct, then I am justified in referring to this group of educators as “a case.”

Merriam (1998:40-43) has identified several limitations of the case study approach that are commonly referred to in the literature. Firstly, effective case study research can be both time consuming and costly. Secondly, because of its attention to detail and in-depth description of situations, it results in lengthy detailed reports which are often not read by those for whom it is intended. A third concern is that case studies have been accused of either over-simplification or exaggeration of situations. Fourthly, case studies have also been criticised for giving too much “detail” of the entire situation which may be irrelevant to the case. Questions have also been raised about the reliability and validity of case study research.

Finally Gray (2004) concedes that case studies have not yet been accepted universally by researchers and have the disadvantage that it is often difficult to generalise. The intention of this case study is not to generalise, but if it is generalisable it is only by analogy.

## **6.5 SELECTION OF PARTICIPANTS**

The bounded system consisted of a group of 60 female, in-service, Foundation Phase educators from schools in a rural area of the Western Cape. These educators were upgrading their qualifications by part-time study as required by the Western Cape Education Department and the National Qualifications Framework. This group of participants were identified as being under-qualified (Grade 10 plus two years of teacher training) and had been selected for upgrading their professional teaching qualifications.

My reasons for selecting this particular group of participants for this study were the following: they met the requirements of a bounded system which is the first requirement for a case; they are a group of educators; they all teach in a predominately rural area; they all teach the same curriculum; they are all experienced Foundation Phase educators and they face a common challenge, namely, implementing national policies on the teaching and assessment of values. The Foundation Phase is generally regarded as the phase of “laying the foundations” for the education process as learners are taught the basics of all learning areas during this three year phase.

On a practical level access to these educators was made fairly easy as lectures were presented during school holidays. This arrangement provided ample opportunities for me to meet with the group and, apart from the costs incurred during the interviews, it facilitated cost effective research.

## **6.6 DATA COLLECTION**

### **6.6.1 DOCUMENTS**

Documentary evidence is likely to be relevant to every case study topic because of its overall value in corroborating evidence from other sources (Yin, 1999). Documents can be divided into primary and secondary sources

but this distinction is not always possible to maintain as some documents are primary from one point of view and secondary from another. Merriam (1998:120), in the following example captures the different types of documents that are appropriate for this study well: “A qualitative study of classroom instruction would lead to documents outlining education policy, curriculum guidelines, lesson-plans of educators, students’ assignments, grade reports, school records and the like.” The use of documents thus opens up possibilities to the researcher to ask many different questions related to the research problem. Riley (1963:252) holds it is important to “determine the conditions under which these data were produced, what specific methodological and technical decisions were made... and the consequent impact on the nature of the data now to be taken over.”

One of the greatest advantages of documentary material is its stability; unlike interviews where the presence of the researcher may alter what is being researched. As Yin (1999: 88) believes “you are less likely to be misled by documentary evidence and more likely to be correctly critical in interpreting the contents of such evidence.”

Like any other sources of data, documents have their limitations. The literature indicates the following limitations of documents: they usually provide general guidelines which causes them to lack specificity; they tend to ignore differences in contexts; they are often a product of the political context in which they are produced and such contexts are subject to change; they may represent the interests of stakeholders who provide funding for producing it and may therefore be biased. Nevertheless documentary analysis of educational records as suggested by Merriam (1998:120) has proved to be an extremely valuable source of data for this study. The documents used in this case study are intended to be read against the background of/ together with the analysis of policy documents as indicated and discussed in earlier chapters.



## **PROFESSIONAL DOCUMENTS**

The professional documents that formed part of the case study itself were:

### **PORTFOLIOS**

An educator's portfolio was a requirement of the module on assessment. These portfolios consisted of ten lesson plans which could provide evidence of outcomes for lessons, assessment standards, assessment criteria and the various assessment instruments, different types of assessment, various assessors, and a variety of learning activities. In this way insight could be gained into the teaching and assessment of values within OBE, in the Literacy, Numeracy and Life Skills/Orientation learning areas of this group. Sixty educators' portfolios were collected.

### **EDUCATORS' VALUES TASK**

The educators were asked to show clearly and describe one learner who frequently exhibited what they would consider as "unacceptable behaviour" (for example disrespect, prejudice or racism) in class. As part of this written task, educators had to identify the values they assumed were lacking or inadequately developed in this learner, identify possible causes of his/her lack of values, and suggest intervention strategies that could encourage the development of positive values. Sixty completed tasks were collected. These tasks accessed the negative dispositions identified by educators, the identification of causes of negative behaviour and intervention strategies to improve and support the teaching of positive values as suggested by educators.

## **PROGRESSION SCHEDULES**

On completion of a grade, learner achievement is reported on official documents of the Western Cape Education Department. Progression schedules provide a summary of learner achievement in all learning areas of a particular grade.

In spite of my assurance that educators could erase all information through which schools could be identified from official progression schedules, educators were generally reluctant to present their progression schedules. Many educators reported that principals were unwilling to grant permission for duplicating these documents as it was considered to be “official” property of the Western Cape Education Department. My attempts to provide evidence that I received official permission from the department to conduct this research did not improve the situation. Eight formal progression schedules were collected. Despite the limited number of schedules that became available, instructive insights that were confirmed by other sources could be drawn from these on how educators dealt with formal assessment.

### **6.6.2 QUESTIONNAIRES**

A questionnaire developed by Green, which was originally based on guidelines on desirable cognitive strategies, by Costa & Kallick, (2000) and Sharp and Splitter (1995) was used in this study. One hundred questionnaires were distributed and returned. (See Appendix A) On the day that I distributed these, my colleague was absent and some of his students were combined with mine. Forty of his students indicated that they also wanted to complete the questionnaire and I complied. These questionnaires provided insights into the strategies that educators used to teach values.

### 6.6.3 INTERVIEWS

A positive feature of group interviews is that it combines elements of both individual interviews and participant observation which may produce concentrated amounts of data on the topic, “The main advantage that group discussion offers is the opportunity to observe a large amount of interaction on a topic in a limited period of time” (Morgan & Krueger, 1998:15). Group discussions can be considered as primary sources of data, because they afford access and insights into descriptions and meanings directly from the informants. In this way they create a fuller, deeper understanding of the phenomenon being studied according to Kingry, Tiedje, and Friedman (1990: 125), and they stimulate spontaneous exchanges of ideas, thoughts and attitudes in the “security of being in a crowd.” Problems common to this approach that I have identified are: obtaining responses from the entire group; a participant who dominates the discussion; possible bias of participants and a tendency towards “naming and blaming.” Nyamathi and Shuler, (1990) have pointed out that findings from group discussions cannot be projected onto the population at large, but this was not my intention in any case.

The group interview continued for the duration of the course and extended beyond the tasks as aspects of teaching and assessment of values inevitably emerged that could be linked to these tasks. Responses and insights that emerged from the group interviews and class discussions were recorded on sheets of newsprint, summarised and arranged into categories. This was the source of much of the rich data reported in chapter 7.

I obtained verbal permission from eight participants who were directly involved in the teaching of the moral dilemma lesson, to conduct informal individual interviews and record their responses. The twelve participants who were involved in either the presentation or observation of the moral dilemma lesson reported to the rest of the group. Thereafter the entire group were given the task of brainstorming the moral dilemma lesson in groups. The data

obtained from this source generated fruitful discussion and is interwoven in the narrative reported in the next chapter.

#### **6.6.4 FIELD NOTES**

I made cryptic notes about unexpected or surprising responses, observations and information that emerged from the discussions during lunch breaks and filled in the details later. I managed to highlight significant points and questions in the course reader during discussions. These served as reminders to me of some points that I wanted to remember concerning the responses and quotations of educators. These quotes were integrated in the narrative reported in the next chapter.

### **6.7 DATA ANALYSIS**

#### **6.7.1 OVERVIEW OF DATA ANALYSIS PROCESS**

Data analysis is generally perceived as the process of constructing meaning out of data. The most basic presentation of a study's findings is a descriptive account of it but Le Compte et al (1993:267) caution that studies limited to descriptions "fail to do justice to their data." Patton (1990:387) writes that the case study "should take the reader into the case situation, a person's life, a group's life or a program's life." Conveying these dynamics of the case study is thus the paramount consideration when reporting a case study. As Stake (1995:78) explains; "... we are trying to understand behaviour, issues and contexts with regard to our particular case ..."

The aim of analysis is to construct, themes, patterns, recurring regularities, differences or categories that cuts across data and links it in such a way that it conveys the meaning that the researcher has derived from studying the phenomenon. Information on category construction found in the literature appears to be general guidelines. This seems to imply that the data may very

well dictate its unique form of categories. Category construction can thus be guided by the study, the literature, the researcher or the data itself. This is entirely possible when using a qualitative approach as unexpected data may emerge.

So while I had pre-selected categories of focus, other categories emerged as “concepts indicated by the data” (Taylor & Bogdan, 1984: 36) or those “that were allowed and unexpectedly emerged throughout the study” (Altheide, 1987:68). This seems to be the most appropriate approach of category construction for this case study. Analysis of questionnaires was guided by the same thematic approach.

## **6.7.2 ANALYSIS OF DOCUMENTS**

### **PROFESSIONAL DOCUMENTS**

The portfolio data analysis was primarily quantitative. I counted the lessons presented for each learning area and reported it as a percentage. With regards to the topics selected for life orientation, I counted the topics and reported those most frequently presented. In respect of the values taught by educators, I reported those values that were most frequently mentioned. I arranged the activities that most commonly appeared in recurring patterns, counted them and reported in terms of percentages. I identified and reported assessment criteria that were most commonly selected by educators and matched these to processes of learning. I counted the instruments used for assessment as well as the different assessors and reported these as percentages.

## **EDUCATORS' VALUES TASK**

Educators were required to provide their own descriptions of negative behaviour of a learner. Educators were instructed to collect as much information about this learner's background as they could through a home visit, interviews with parents and siblings, discussions with pre-school educators, school records, medical history, and the like. Bearing in mind that these were foundation phase learners, it was unlikely that schools would have all this information, so this was an appropriate task to compile a profile for these learners. I counted the number of times a description of negative behaviour was mentioned and arranged them in themes. Several categories of negative behaviour emerged from the descriptions of educators. In respect of causes of negative behaviour that educators identified, seven broad themes emerged. With regard to intervention, several strategies were identified and suggested by this group. I reported them in order of frequency.

## **PROGRESSION SCHEDULES**

I used the progression schedules that became available to me and counted the frequency of codes assigned to learners for Life Orientation, in order to determine how educators dealt with formal assessment in terms of the reporting of codes.

### **6.7.3 ANALYSIS OF QUESTIONNAIRE DATA**

I analysed the data by using Quantitative (simple statistics) and qualitative analysis (thematic coding) of the data. One hundred questionnaires were distributed and returned. The objective of this questionnaire was to establish the most common pedagogical approaches used for the teaching of values in selected primary schools and the frequency with which it is done.

#### **6.7.4 ANALYSIS OF INTERVIEW DATA**

The group interview served as a means of corroborating those areas of teaching values that had emerged from the moral dilemma lesson. The main points of discussion in each group were written on newsprint, common themes were identified and this helped to avoid duplication of ideas. A wide range of views of the topic under inquiry became available in this way. With semi-structured interviews I used an interview schedule which incorporated questions that were directly linked to the moral dilemma lesson. I recorded the responses of seven educators and followed thematic content analysis.

#### **6.7.5 ANALYSIS OF FIELD NOTES**

During group work, the responses of the groups were recorded on sheets of newsprint. I made cryptic notes, of the main points from the group discussions. I found it very valuable as a means of identifying the most common themes and interesting quotes that emerged during discussions. This information was integrated with the analysis described in 6.7.4.

#### **6.8 DATA VERIFICATION**

Methodological triangulation denotes the use of multiple research methods and strategies to research a single topic, for example combining quantitative and qualitative methods. While triangulation of data is usually intended to show convergence of data, it is not appropriate for this study. Multiple methodologies of research were used not only to show convergence between different sources of data, but also to point out divergence.

## **VERIFICATION CRITERIA**

Marshall and Rossman (1999) observe that all research must respond to questions against which the trustworthiness of the project can be evaluated. In the conventional positivist paradigm these criteria are: internal validity, external validity, reliability and objectivity. Guba & Lincoln (1981) argue that these criteria are inappropriate to qualitative enquiry and suggest that, to establish the “truth value” of a qualitative study, criteria must address issues of credibility, transferability and conformability. While this study is a mixed-method study, consisting of both qualitative and quantitative enquiry, I have selected to use the criteria suggested by them.

### **CREDIBILITY**

This is the alternative to internal validity of the positivist approach. Guba and Lincoln (1981) argue that an in-depth description of the complexities of variables and interactions of a social group (which is the objective of qualitative research) will be so saturated and embedded with data derived from the setting, that it cannot help but be valid. Bogdan and Biklen (1982) regard credibility as a fit between the data that is recorded, and what actually occurs in the natural setting that is being researched. Within the boundaries of that setting, participants and theoretical frameworks, the research will be valid. I used multiple methods of data collection to enhance and ensure the credibility of this study.

### **TRANSFERABILITY**

Guba and Lincoln (1981) propose this as the alternative to a positivist notion of external validity or generalisability. Transferability is problematic for a qualitative researcher and in the literature it is often cited as a weakness of this paradigm. It is not intended that the findings of this case study should be transferred to other contexts as this case study forms part



of a bigger picture in this study of the teaching and assessment of values. It provides an illustration of one possible way among many possibilities, of how a group of educators engage with the teaching and assessment of values in their unique ways. It provides an additional perspective that needs to be located within the context of different perspectives drawn from various disciplines.

## **CONFORMABILITY**

This criterion is the alternative of the positivist notion of objectivity (deVos et.al. 2005). Guba and Lincoln (1985) stress the need for the findings of the study to be confirmed by other studies. In this way the data serve to confirm other studies. The appropriate question for qualitative inquiry from this point of view then becomes to establish whether the data helps to confirm the general findings of other studies. I have linked my work to other studies (The Report of the President's Education Initiative Research Project, 1991; The Report of the Review Committee on C2005, Life Orientation Overview (2002:14); Green's (2004b) school-based research on human rights of learners conducted for the Department of Education

## **6.9 ETHICS**

Baker (1988:76) holds: "The right of social scientists to study whatever they deem to be of interest is fundamental to a free society." This right, however, is not an absolute right and must therefore be negotiated against the rights of those under study. The fact that human beings are the objects of study in the social sciences brings unique ethical issues to the fore (de Vos et al. 2005). It is thus essential that ethical principles should guide research. Ethics is defined as "a set of moral principles which is widely accepted and which offer rules and behavioural expectations about the most correct conduct towards experimental subjects and respondents" (de Vos et al. 2005:57).

Different authors identify different ethical issues and I have selected the following key issues applicable to this study:

### **AVOIDANCE OF HARM**

It is difficult to predict forms of discomfort to participants beforehand, but being aware and informed of the possibility can only benefit research. I made it clear from the outset that I was willing to discuss any issue that this group was not in favour of. To this end, I allowed participants to speak Afrikaans as they displayed discomfort in speaking English during interviews. Furthermore I allowed peer observation of lessons when participants expressed feeling “intimidated” by the presence of a lecturer, particularly as this was a new teaching strategy for them. The educators were all keen to “try it out first” and then to present a lesson where I was present. I was interested in their initial unrehearsed responses so I did not use a follow-up lesson as a source of data.

### **INFORMED CONSENT**

I obtained written permission from the Western Cape Education Department to conduct this study. In terms of the requirements of the University of the Western Cape, participants were requested to complete consent forms providing written permission that information and data obtained during lectures, discussions, questionnaires or from tasks could be utilized for the purpose of this study. All participants were informed in writing that they were under no obligation to continue with this study and that they were at liberty to withdraw at any time.

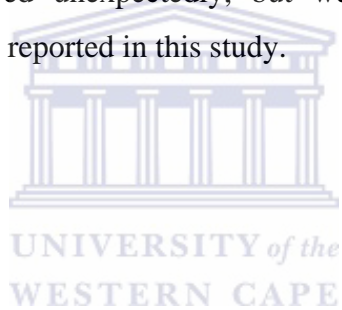
### **VIOLATION OF CONFIDENTIALITY**

We agreed that during group work, when responses were recorded on newsprint, they would record a code next to the responses of participants. In

matters relating to education, it is at times unavoidable to encroach on the “privacy” of participants as classrooms are visited by researchers. I realise that consent to use classrooms is a privilege, thus both refusal and consent should be respected. Every means of identification has been removed from the text to ensure that the privacy of participants has not been violated in any way.

## **INTEGRITY**

Researchers should not under any circumstances change their data or observations (Mouton 2007). Fabrication or falsification of data is regarded as a serious transgression of the code of ethics. Positive, negative and also those findings that arrived unexpectedly, but were related to the analysis of findings, have been reported in this study.



## CHAPTER SEVEN

### THE CASE STUDY

#### 7.1 INTRODUCTION

The aim of the case study was to explore how a group of educators in primary schools, in a rural setting, taught and assessed values. The case study presents one of several perspectives on the teaching and assessment of values in this study. It is significant as it provides an important “practices on the ground” perspective. This perspective is not always fully captured by theories of learning and conceptual analyses that apply to contexts in general.

This chapter presents an illustrative, narrative portrait of how this was done. At the heart of narrative analysis is the way humans experience and relate their experiences and how they give meaning to their lives. The text integrates descriptions, summary tables, and direct quotations from conversations with participants. The length of this chapter is a consequence of the narrative approach and is not to be taken as a sign that it is more important than other chapters. The first section addresses the teaching of values and the second section focuses on the assessment of values.

#### 7.2. SETTING THE SCENE

The group of well dressed, female educators, who arrived for the first lecture in the lecture room, looked strangely uncomfortable as they settled themselves at the tables usually occupied by students. A few of them found the chairs physically uncomfortable and remarked “*I can’t fit into this chair.*” There was a distinct atmosphere of anxiety and discontent about the room. A question that indicated this and was frequently asked was “*when last did you attend classes?*” The response generally was “*it was so long ago, maybe*

*twenty years, I can't remember.” Someone replied “Well my youngest child is in grade twelve this year and I have three grandchildren, does that answer your question?”*

It became obvious that these educators were not happy with the prospect of further studies. The irritable remark of an educator confirmed this observation; *“Why can't they just give us the diploma. Some of us have twenty five years of teaching experience”* while another along the same lines remarked *“why must I learn these things now when I am almost retired?”* Educator CC offered the following explanation; *“You must use your own professional judgement. This is what the policies tell us to do you see. So it is actually up to you to decide.”* Another stinging remark was *“this OBE assessment is a flop because nobody knows what to do. It is a lot of big words which nobody can explain. I hope that you know what to do because the workshops are a waste of time. Everyday these people come up with new ideas and big words but they cannot show us what to do.”*

This remark hit home but an encouraging response from an educator was *“we used to give children a symbol like a “B” for neatness in the old days which you could see from his clothes and books, so this is not new.”* One remark that caught my attention was; *“In all of these years I have never given a child a mark for his values. How are we supposed to do this?”* This, I thought, is exactly what this case study was trying to explore.

A colleague pointed out *“the language is going to be a problem as they object to me lecturing in English. I am not very proficient in Afrikaans, but by now, after doing this for some time, I know how to solve this problem, I speak Bo-Kaap Afrikaans.”* (This is a particular mixture of both languages). After the break, I told them that I would translate the course into Afrikaans to help them. Their sense of relief was almost tangible. I was encouraged that in this way I had overcome another barrier.

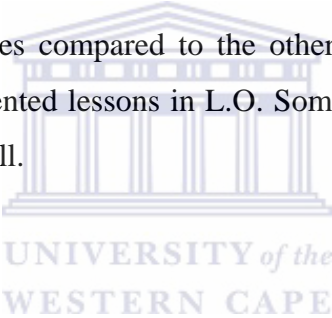
## 7.3 THE TEACHING OF VALUES

### 7.3.1 LEARNING AREA PREFERENCES

In their portfolios educators had to present ten lesson plans which illustrated their teaching and assessment within OBE in three different learning areas, namely Literacy, Numeracy and Life Skills/Orientation. Educators were at liberty to decide on the number of lessons per learning area that they presented provided that they included examples from all three Foundation Phase learning areas. The lesson plans provided useful information about how these educators were actually teaching and assessing values in their classes within an OBE model.

As Table 1 indicates compared to the other two learning areas, not many educators had presented lessons in L.O. Some educators did not include any lessons on L.O. at all.

**TABLE 1**



Learning areas	% of lesson plans
Numeracy	44%
Literacy	37%
Life Orientation	19%

When I returned the portfolios, I reminded them of the requirements and pointed out that some of them had not included L.O. lessons and I wanted to know why. The following reasons emerged from the feed forward discussions in class:

Educator B: *“I am still uncertain of what to do in L.O.”*

Educator F: *“I am more comfortable teaching Literacy and Numeracy as most of the work has remained the same, I mean addition and subtraction are still the same things although some words have changed. So you basically know what to do and how to do it. But L.O. is now very different.”*

Educator W agreed and added: *“Yes do you remember in the old days we taught hygiene and civics but this stuff with the big words I don’t know.”*

Educator J: *“you see my old teaching resources can still be used for Literacy and Numeracy but you have to make your own activities for L.O. and I am not even sure if I am doing the right thing.”*

Educator N remarked *“I am a teacher not a psychologist. You need to know a lot about the development of children and that stuff.”* There seemed to be general agreement on this point.

What I concluded to be a significant message from the learning areas presented in these portfolios was that, compared to the other two learning areas, L.O. was the least preferred learning area.

Furthermore, there appeared to be no consistent mention of values in the other two learning areas. In some Literacy and Numeracy lessons values were mentioned sporadically, but values were most consistently mentioned in L.O lessons. So I realised that evidence of the teaching of values was most likely to be found in L.O lessons. As a means of orientation I provide some very basic information about this learning area in the Foundation Phase obtained from the following policy documents: The RNCS General Education and Training (GET) Grades R-9 (2002) and The Revised National Curriculum Statement Resource Material, Western Cape Education Department (WCED 2003).

### 7.3.2 OUTCOMES, TOPICS AND LEARNING TASKS IN LO LESSONS

The RNCS General Education and Training Grades R-9 (DoE, 2002:4) describes the Life Orientation Learning Area (LO) in the following way:

... it equips learners for meaningful and successful living in a rapidly changing and transforming society. Its focus is the self-in-society and its learning outcomes are the social, personal, intellectual, emotional and physical growth of learners.

The document continues that learners live in a complex and challenging environment and crime, violence, environmental issues, diseases including HIV/AIDS, and forms of abuse affect every school, community and learner. LO develops skills, knowledge, values and attitudes that empower learners to make informed decisions and take appropriate action regarding these challenges.

The RNCS General Education and Training Grades R-9 (DoE, 2002: 4) states that the Life Orientation Learning Area has four outcomes namely:

- Health promotion
- Social development
- Personal development
- Physical development and movement

I used a framework that that the educators who had provided lessons on L.O. followed for their lesson plans, to explore their teaching of values by asking the following three questions:

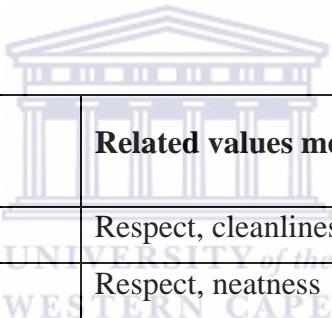
- What were the learning outcomes of the lesson?
- Which topics and values were selected?
- What learning tasks were given?



It was evident from the lesson plans that the learning outcomes and assessment standards were based on the four outcomes described earlier. The outcomes appeared to be written *verbatim* from the policy documents of the L.O. learning area without any attempts to interpret them.

The Foundation Phase LO curriculum provides some themes and topics which educators are required to teach. For example for the learning outcome: Social Development: “...to show an *understanding* of diverse cultures and religions” as stated in the RNCS General Education and Training (GET) Grades R-9 (2002: 13). The topics most frequently selected by educators are presented in Table 2 below.

**TABLE 2**



<b>Topics</b>	<b>Related values mentioned</b>	<b>Learning Outcomes</b>
My body	Respect, cleanliness	Health promotion
Littering	Respect, neatness	Health promotion
Abuse	Respect, pity, sympathy	Personal development
Feelings	Respect, obedience	Personal development
Shopping	Honesty	Social development
Religious festival days	Respect	Social development
Diseases	Cleanliness	Health promotion
Nutrition	Respect	Health promotion
Places of worship	Respect	Social development

It was evident that the topics selected for teaching and assessment were all prescribed by the curriculum which indicated that educators carefully followed and implemented what the curriculum prescribed. I wondered what this meant. I thought of two possibilities, firstly, it could perhaps have indicated that these educators lacked innovative and creative ideas to introduce other topics related to these learning outcomes or secondly, that they preferred to play it safe and just do what was required. In some cases educators made photo copies of entire lessons they had received during curriculum training sessions and offered these as models. The lack of originality and innovation in lesson plans was obvious.

Table 2 shows that the value that was consistently mentioned by educators was respect. Table 2 also demonstrates that while the topics chosen by educators in this case study suggested opportunities for the teaching of other values, educators did not mention these. For example, the topics on places of worship and festival days provided opportunities to identify values such as caring, tolerance and compassion, which might be common to all religions. The topic on feelings provided opportunities to discuss discrimination, injustice and abuse and express those feelings that learners experienced when they were bullied or called names that are hurtful and again provided an opportunity to discuss caring, sympathy and understanding.

Table 3 demonstrates, in order of frequency, the kind of activities that most commonly appeared in the lesson plans.

**TABLE 3**

<b>Activities required for tasks</b>
Filling in one word answers on worksheets
Matching items
Colouring in activities
Recognition of items
Connecting dots to form the outline of an animal or object

Tasks which require learners to choose, select or name things according to Bloom's taxonomy (1956) are generally considered to reflect cognitive abilities, such as understanding, while the drawing and writing tasks required primarily, the exercise of fine motor control. Examples of comments offered by educators were "not to colour in over the outline"; "to draw straight lines to connect the dots" and "to make sure that you choose the correct item." These tasks did not teach much about valuing health or religions, respect and honesty. It was clear that the focus of these tasks was on the teaching of knowledge about the topics. Furthermore the learning activities presented on these worksheets actually became assessment activities as educators used the operations of these tasks, for example the ability to colour in, as assessment standards for their assessment tools which were usually checklists and rubrics.

It was obvious that activities such as filling in one word answers on worksheets were by far the most commonly preferred activity. I wanted to know why educators favoured worksheets. The following responses were provided during group interviews:

Educator S: *“it saves time in class and it also saves time when you have to mark.”* Educator P: *“it looks much neater and it is easy to see if there is a mistake.”* Educator F: *“children don’t like to write a lot. They like to cut and paste and do such things.”* Educator F: *“I like to do more practical things in L.O. So I don’t let them write a lot. Anyway these activities are the same as those in the workbooks for L.O. so I use them.”*

The response of Educator X was *“worksheets are easy to duplicate and distribute”* which several educators agreed with and an important consideration for all was that *“it could serve as concrete evidence of what had been done in class.”* A number of educators agreed that worksheets were easier to store than projects and the general opinion was that worksheets facilitated the work of educators.

Educator Y *“I prefer the worksheets of the department because it shows me what to do.”* Educator V: *“We duplicate the worksheets so we all do the same thing, same lessons, same activities, everything is the same.”* Educator D pointed out that *“models and projects were considered to be risky particularly in view of the high incidences of vandalism that occurred in our schools.”* Educator M pointed out that *“group projects for the little ones usually take a lot of time and with such large numbers it is difficult to monitor activities with paint and brushes let alone the accidents that may occur. It is just not on for me.”*

It appeared that time constraints, meeting the requirements of policy, and uniformity of lessons were regarded as important considerations for this group and there seemed to be strong agreement that tasks should require very little written work. I assumed that the implication here was the large numbers of learners per class. There seemed to be alignment between the learning outcome: *“...to show understanding of diverse cultures and religions”* (DoE 2002: 18) in the lesson plans as the lessons provided knowledge and understanding about religions. But while these tasks were completely

appropriate for teaching about religious buildings, symbols, books and religious festival days, there appeared to be a lack of effort in teaching towards the *valuing* of religion, or tolerance for other religions.

### 7.3.3 VALUES EDUCATION PRIORITIES

The lesson plans suggested that educators had a limited understanding of what was involved in the teaching of values. I realised that I had to explore this further. Following a discussion of the values prescribed in the Manifesto, I asked the group to respond to the question; which values do you teach? The group interview yielded the following insights:

Educator X *“I just teach values such as respect and caring in L.O. but do not even bother with tolerance, openness, patriotism and whatever. What do these things mean... anyway isn’t respect the basis of all of these values?”* Several heads nodded in agreement and then everybody seemed to be responding at once.

Educator AA: *I don’t ignore the new values completely but I teach it mostly in L.O. I still do it like in the old days where respect, neatness and honesty used to be part of every lesson. So I concentrate on these. Sometimes I just forget to plan for particular values. Yes, you must plan because you must think which values to select for a topic and it is not always easy.”*

A very angry educator E did not mince her words: *“Yes that is it. Look let me be honest. I do not teach these values in all my lessons simply because this values thing has been pushed onto me ...right? Let me tell you what. It is not working for me. It doesn’t even work with my own two children at home how do you expect it to work here with 50 learners? I am telling you educators who claim to be teaching these values all the time are lying through their teeth for if they were, discipline at schools should have improved over the years. Now you tell me honestly, has it?”*

Educator L: *“you know what, I still believe in spare the rod and spoil the child and I don’t mean that learners must be assaulted. But as a parent ... a couple of whacks still do the job, and it works.”* Educator A responded *“yes, those were the old days but now it is illegal. You will get a lawyer’s letter or even be dismissed. It is not worth it.”*

Educator R: *“Absolutely! Well what did you expect? They have taken religion out of schools, corporal punishment has been taken away, and parents feel that they are no longer responsible for the behaviour of their children. They just pay the school fees. Now we must teach values and if we discipline learners, the parents are on our case instead of supporting us like parents did in the old days. So I try to teach respect.”*

By this time there was a distinct sense of anger and frustration in the room and animated discussions were going on everywhere. Educator P to Educator R: *“I agree with you but you know what? It is the system that is wrong. The government makes laws that prevent parents from disciplining their children; schools cannot discipline learners; teachers are so afraid of policies and progressive discipline, so they rather side-step issues of discipline. I have decided that if a child wants to be rude it is his parents’ problem, not mine. I am not getting my blood pressure up and more stressed out at my age with court cases. I won’t even pretend to be teaching all these values because I am not!”* The nodding heads indicated that this was the general feeling.

Educator S soberly added: *“Good values will not grow in such a system that wants to promote values and discipline but does not assist and support us to do it. We have no authority, no protection whatsoever while learners and parents have all the rights. I am not saying that I don’t teach values, because as a teacher I know that I must and we always have. I have taught many children who are responsible and respectful adults today, doctors and lawyers you name them.”* The applause was deafening.

In contrast to the impression given by the lesson plans, it was clear that educators had insights regarding the teaching of values it was not surprising that *respect* was identified by most educators as the most important value, as the general tendency seemed to have been to equate “values education” with teaching respect. Educators admitted that they did not easily identify the range of values that could be associated with the various topics, so it appears that while most educators wished to teach values such as *respect, honesty and cleanliness*, there seemed to be a lack of ability or commitment to teaching the other values prescribed by the curriculum.

From these responses I concluded that there could be several reasons for this. Firstly, educators may not personally support these values; secondly, educators may lack a moral vocabulary and understanding of what these values mean, thirdly, educators may have considered these values as too complex and difficult for their learners at this stage and fourthly, educators may have resented the teaching of these values simply because they were forced to teach these and did not know how it should be done.

From these discussions it was clear that despite the constraints and challenges that they faced, these educators nevertheless accepted that they had a moral responsibility to teach values, that they were concerned about the values of learners and regarded it important that learners should be taught positive values. Then it dawned on me that educators offered the same kind of activities to teach knowledge, values and skills. I realised what the confusion was; failure to distinguish between different categories of knowledge and to understand values knowledge as a distinctive category of knowledge, but one that includes knowledge and skills.

Educators were required to select one learner in their class who displayed a disposition towards negative behaviour and to present a task that could serve as an example of diagnostic assessment of values. A disposition was defined

as a preference for certain forms of behaviour. Table 7 demonstrates in order of frequency the negative behaviour of concern to educators and the values they associated with each.

**TABLE 4**

<b>Label given to negative behaviour</b>	<b>Total mentions</b>	<b>Values considered to be absent</b>
Disrespect	60	Respect for teachers; self-respect; respect for others; respect for rules; respect for what belongs to others; respect for what belongs to all; respect for discipline; respect for school; respect for authority
Unwillingness to co-operate	56	To adhere to class rules; to do homework; to show appreciation for the classroom; to look after learning material; to wait your turn; not to shout out answers; to accept discipline; to be willing to be taught.
Lack responsibility	50	To work hard; to appreciate books; to be responsible for actions; to do homework; to act responsibly; to be responsible for own learning
Dishonesty	48	Not to tell lies; not to be dishonest; to respect what belongs to others; to ask permission to use what is not theirs
De-valued by others	44	To have a supportive family structure; to be part of a functional family; to live in a gangster and drug-free environment; to live in a caring community.
Violence	42	To be friendly; to value peace; not to react with violence; not to be over sensitive; to seek peaceful solutions to problems
Low self-esteem	36	To believe in their ability to succeed; to be enthusiastic; to work hard; to set goals; to make good choices; to develop positive values; that it is okay to be different; value self
Aggression	36	To think before acting; to exercise self-discipline; to talk rather than fight; not to be easily offended or angered; not to resort to insults or respond with violence.
Lack of diligence	36	To be punctual; to be hardworking; to be committed to learning; to be dependable; not to give up; to put in an effort to learn
Lack of interest	32	To show interest in learning; to be willing to be taught; to show interest in their future; to develop an interest in seeking information; to show interest in developing positive values
Lack of security	30	To feel protected in class; not to feel that they have to defend themselves; that they are entitled to fair and just treatment; that they are safe; that they can be children; that they should not feel threatened
Lack of valuing of self	24	To have confidence; to love themselves; that nobody is good at all things; to be proud of what they can do and achieve; to know that nobody is perfect; that there is no need to impress others; by doing what is wrong; to do good
Lack of self-acceptance	24	To have a sense of value; not to be influenced by peer pressure; to avoid belonging to gangs; to choose good friends



The categories and descriptions of values considered to be absent were provided by educators. I made no attempt to categorise descriptions of behaviour that could be considered as logically belonging in the same category, as the point of this task was for educators to identify the values that were absent and resulted in negative behaviour. For example control of aggression and non-violence could belong to the same category as non – violence by implication means to be able to control aggression. It appeared that educators provided examples of negative behaviour more easily than identifying the values considered absent. What this suggests is that educators were often unsure of how to identify values and that in many instances cognitive and social skills were mistakenly identified as values. It was evident that in most instances causes of negative behaviour were described without reference to a lack of positive values. So this seems to suggest confusion about the relationship between negative behaviour and a lack of positive values or otherwise a lack of a moral vocabulary to describe issues relating to morals and values.

It was clear that the greatest concern of all these educators, and the value most consistently identified to be absent, was a lack of respect, followed by unwillingness to co-operate and a lack of responsibility. This group regarded respect, responsibility and co-operation as the three most important values which were also confirmed by their lesson plans. This seems to underscore their preference for those values that they considered to be important for themselves. It is interesting to note that the values consistently considered to be lacking, could probably be identified as the key values or dispositions needed for the successful teaching and learning of values in schools.

I wanted to find out what this group of educators had identified as possible causes for the lack of positive values and the negative dispositions that learners in their classes displayed. The question that I posed was: why do learners behave in these negative ways? From this values task and open discussions, the following themes of *causes of negative behaviour* emerged:

## **DYSFUNCTIONAL FAMILY STRUCTURES**

Educator X reported: *“This learner’s father has been imprisoned for the last six years. He has never really known his father.”* Educator H remarked: *“It is amazing how many learners grow up without a father figure and you know it is the father that can control the children. No wonder these kids are so unruly.”*

Within this theme the following social causes of negative dispositions were identified: Single parenting, dysfunctional family relationships, divorce, illegitimate children, abusive stepfathers, mothers’ boyfriends acting as head of households, feeling unprotected by a father figure, vulnerability, feeling unaccepted and rejected and low self-esteem.

## **LACK OF POSITIVE ROLE MODELS**

Educator K remarked: *“Our learners lack the influence of positive role models in their lives. Their parents don’t model positive values and behaviour to them and they grow up in a violent society where they have to fend for themselves. No wonder they are so defensive and aggressive.”*

Educators generally identified the absence of positive role models such as father figures; peers who have a positive influence, failure to identify with heroes in society, hero worship of negative role models, gang related activities, acceptance by gangs, being rewarded by gangs, status and protection of belonging to gangs as negative influences.

## **POVERTY**

*“Poverty and economic hardship is a root cause of negative behaviour in this community. Many parents are seasonal workers on farms and cannot provide for the needs of their children”* was the comment of Educator L.

Financial stress, debt, lack of skills, lack of resources, limited ability for entrepreneurship, limited education, limited levels of literacy, lack of vision, lack of drive and purpose to improve situation, alcoholism and drug abuse, extended families, dependence on government grants and pensions, criminal activity such as theft, latch-key children, no parental supervision after school were identified as causes of negative behaviour.

### **LACK OF PARENTAL INTEREST**

An elderly Educator S offered the following advice:

*You see my experience has taught me that children learn their values in the homes and society that they grow up in. If parents don't teach them "the magic words" in their homes they will adopt the values they learn on the streets. That is why I said that parents don't support us as they did in the old days. Some parents have no control over their children anymore; their children control them.*

Lack of interest in children, inability to show love and affection, lack of valuing and acceptance, lack of parental commitment to discipline children, a perception that schools are responsible for the discipline of children were identified as causes of negative behaviour.

### **CRIME AND VIOLENCE**

Educator B remarked; *"People don't have conflict resolution skills and they settle disputes through violence."* Educator S explained:

*In some communities learners have had too much exposure to violence so they have internalised violence to the extent that they can only respond to and through violence. You see they associate violence with power and*

*because we cannot use corporal punishment anymore they are not scared, they don't feel threatened. Corporal punishment speaks louder than our voices.*

The responses indicated that these educators believed that the family is the first informal seedbed of values formation and that the efforts of the family to teach values provided a solid foundation for the formal teaching of values. It was clear that they believed that parents and society equally had a duty to develop moral sensitivity in learners. The responses showed that these educators were sensitive to a need to model love and compassion to learners, as this seemed to be lacking in the lives of many learners who were subjected to violence daily, and were aware that the negative behaviour that learners often displayed, could be a manifestation of the behaviour they witnessed from negative role models in their society.

I then wanted to know *how* these educators addressed the teaching of values in their classes given the debilitating socio-economic contexts in which most of their learners lived. I constructed a questionnaire to establish their teaching practices.

#### **7.3.4 VALUES EDUCATION PRACTICES**

Questionnaire responses were summarised as Table 5 shows

**TABLE 5**

<b>Type of approach</b>	<b>Always</b>	<b>Sometimes</b>	<b>Never</b>
Rewards/ rules)	70 %	30 %	
Role Modelling	40 %	60 %	
Discussion, topics unspecified	60 %	40 %	
Discussion of moral dilemmas	0	35 %	65 %

Table 5 shows that the majority of educators used behaviourist approaches to teach values, either by means of rewards, modelling behaviour or discussions of values, but reflected that moral dilemmas were unfamiliar to more than half of the educators. The following responses were collected during group discussions as reasons for educators' preferences:

Educator H explained *"it is only when the learners know that they can gain some reward that they will behave. Otherwise they just won't listen. I feel like I am bribing them all the time just to get their co-operation. What else can I do? I have a curriculum to complete."*

Educator J added *"Parents sometimes resent it when their children are punished even if it's for their own good. So I stick to the code of conduct."*

Educator K: *"But of course a code of conduct can never fully capture the dynamics of life in a classroom. Our code of conduct does not prohibit chewing gum in class so learners go ahead and chew gum."*

Educator AA: *"If you want to encourage good behaviour reward them. In my class it is a competition to see who has the most stars."*

In respect of parental interest Educator P explained: *"these parents all work and seldom respond to invitations to come to school. The School Governing Body seldom considers temporary exclusion or even expulsion as this is a process which takes time and a lot of paper work and parents are reluctant to co-operate."* Educator S: *"but in any case temporary expulsion just sends them to the streets and when they return to school they are even worse because they feel that they had won the case."*

It was interesting that a few educators reported that some parents were in favour of re-instituting corporal punishment in their schools. These parents indicated to them that they would settle for "three of the best" for their

children instead of being absent from work and forfeiting a days wages to report at the school.

Educator F replied: *“I know it is illegal now but the Bible says: spare the rod and spoil the child. So I agree with these parents, it did not do us any harm.”*

Educator P pointed out that excluding learners from the classroom as punishment was futile as learners regarded it as “pleasure.” She explained: *“some learners engage in negative attention seeking all the time and actually enjoy the punishment as it made them a hero in the class. Learners who are sent from the classroom end up being messengers and what was intended as punishment actually ended in pleasure for them.”*

Educator X pointed out that *“high incidences of alcoholism and family violence still plague many farm workers and some parents are not modelling good behaviour to learners.”* Educator AA pointed out: *“for many learners local taxi guards have become role models. Learners are lured by the cell phones, brand name clothes and gold jewellery that are characteristic of these men even if it is gained through illegal means.”*

Educators generally agreed that time-out, sending learners to the office, demerits, sending letters to parents or withholding certain privileges were common forms of punishment for disobeying rules at their schools. Detention was not considered as an option at some schools as learners were bussed in from neighbouring farms and could not be detained. Many educators indicated that while they discussed role models their perception was that these learners lacked good role models in their community whose behaviour they could emulate.

### 7.3.5 RECOMMENDED SOURCES OF SUPPORT

It was obvious that these educators felt the need for support in their efforts to teach values, and I wanted to know what they regarded as support for their efforts to teach values. All the recommendations that the groups offered were recorded on newsprint. Table 6 shows the number of educators who indicated support for each recommendation.

**TABLE 6**

1	Refer learners to social workers	48
2	Refer learners to school psychologist	40
3	Parental involvement	32
4	School, church and society should teach values	24
5	Policies must focus on responsibilities not rights of learners	20
6	Improve security at schools	20
7	Home visits	18
8	Schools should teach values	16
9	Partnership with police	16
10	Invite motivational speakers	16
11	Enforce the Code of Conduct	14
12	Praise learners for good dispositions	14
13	Bring religion back	12
14	Encourage communication with learners	12
15	Community involvement with schools	10
16	Sport and recreational activities	06
17	Arrange cultural weeks	02

The alarming message that the recommendations of Table 6 conveyed was that educators believed that they had limited abilities to encourage and nurture positive dispositions in learners. For while these educators had indicated that they generally accepted the moral dimension of their profession “we have always taught values,” but expressed concern that learners were becoming more disrespectful and disobedient, they clearly doubted their own potential to teach positive values. Did this imply that educators no longer had faith in their own abilities to teach values?

Data on Educational Psychology’s capacity in the provincial department of the Western Cape supplied by Nel (2007) indicate the following statistics; 71 posts are filled at district operational levels for 930270 learners. Based on these posts the ratio is 1:13102. An article in the Cape Times (March 24, 2008) under the heading “Not Enough Educational Psychologists for Schools” points out: “...*The education department is overburdened in terms of the number of children who need support.*” It became clear to me that if external sources of support did not seem feasible then for the foreseeable future the responsibility to teach values is likely to remain with educators. So I thought if external sources of support are unavailable, then internal support might improve their values teaching practices.

## **AN INTERNAL SOURCE OF SUPPORT**

Four educators were given the opportunity to teach a hypothetical moral dilemma lesson. The lesson was presented for grade 2. The logistics of needing three educators at the same school; a teacher, observer, and another educator to supervise the class of the observer, made it impossible for all educators to participate in this lesson. All educators were however provided with a copy of the lesson and were informed about it. (See appendix B.) A group interview served as a means of brainstorming and reflection on the lesson. The responses documented below represent those of educators who presented the lesson, those who observed the lesson, as well as the rest of the



class who offered comments and opinions. The following insights emerged from the interviews.

### **ENTHUSIASM FOR NEW TEACHING STRATEGIES**

Educator X responded to the moral dilemma lesson in this way: *“It reminded me that children have their own issues to deal with. We bother children with Aids and things; this is what they need; how to deal with those things which affect them and to give them direction at school about the kinds of choices they could make.”*

This comment demonstrated that even young learners in different social contexts may have their own unique moral issues to deal with in their world and that educators should try to discover what these are. Here was some confirmation for what I had suspected for some time: that teaching values at schools should at least *connect with the real life situations that learners encountered*: at schools, on the sport field, and in classrooms to assist them to respond in positive ways to challenges. In this way schools can become safe places of value formation where learners do not respond in terms of fear of punishment or rewards, but because of what they learn about *“living values”* and the thinking tools provided for them.

Most educators supported the view expressed by Educator CC: *“You can present this lesson to children of any religion as it does not promote any specific view but deals with making choices and honesty is common to all religions.”* Educator P responded: *“Presenting it in this way is more real than telling them not to cheat in a test it really makes them experience the situation.”* Educator Q who had presented the lesson remarked *“This is a good way to encourage participation in the lesson. Learners were eager to share their experiences and contribute to discussions.”*

Educators displayed enthusiasm for this approach and reported that they had generally enjoyed presenting this lesson. It was significant that some educators almost immediately associated this lesson with religious instruction. Bearing in mind that this lesson was intended to introduce educators to a new approach to the teaching of values, I was interested to know what the learners and educators had learnt from it.

The moral dilemma lesson “I make good choices” provided an opportunity to discuss a very important aspect for learners in this age group which is choosing friends. Educators did not use this opportunity to discuss the qualities or values that could guide them when choosing their friends with learners but chose to concentrate only on the context of this lesson.

## **INDIVIDUAL INTERVIEWS**

The semi-structured individual interviews that I conducted with four of the educators who had presented the lesson provided the following insights:

Interviewee One: *they could identify with the characters in the story as well as its content and said they must not help him.*

Interviewee Two: *they said that they would all be in trouble.*

Interviewee Three: *it was relevant and familiar to them. Many said they had witnessed similar situations.*

Interviewee Four: *some immediately said they must not do it which shows that they understood the story and had possibly experienced the situation in reality and could understand the consequences.*

These comments from learners are evidence of an intuitive developing moral consciousness and demonstrated that there was a definite disposition of goodwill towards fairness, justice, and respect for honesty. I then wanted to know if learners were able to identify values by naming them (their moral vocabulary) and I asked the interviewees to name specific values that

learners mentioned. Learners demonstrated that they had some command of a moral vocabulary as they were able to identify some values by name. My assumption based on the values that these educators mentioned, was that the learners who had responded to the naming of values, have a limited moral vocabulary.

It is possible that there may be two reasons for this; the focus of the educators was mostly on dishonesty (lying, cheating, not fair, wrong not right), or the limited moral vocabulary that educators themselves seemed to have used. This indicates that while it is possible that educators may have taught a moral vocabulary, it may be limited as concepts such as loyalty, justice, caring and compassion were not mentioned. The intention of the moral dilemma was to expose educators to a new strategy for the teaching of values and I was keen to know if they had learnt anything about their learners' understanding of values from this lesson.

Interviewee One: *For them values is about right or wrong, honesty or dishonesty.*

Interviewee Two: *The context is not important for them it is either or.*

Interviewee Three: *They are unable to reason about values but they know right from wrong.*

Interviewee Four: *They do not see other values such as loyalty yet, in this situation it is about honesty or dishonesty. Perhaps we must teach one value at a time.*

Educator Q pointed out that in her class: *“they suggested harsh punishment for all involved and made no distinction between those who had done the correct thing or those who did not; what was important was that punishment should be severe and preferably visible to them.”*

Interviewee Four: *Some actually wanted to help Eben. So I think we need to stress co-operation for the right reasons.*

These responses demonstrated that although learners knew about honesty, they did not know when to choose honesty above loyalty and would probably also not know when the reverse was required. Educators' opinions on conflicting values generally appeared to be "*perhaps these were too difficult for learners at this level.*" The earlier response of an educator that at this stage, learners should be taught one value at a time is something to reflect on. Furthermore teaching values in terms of its "situational context" for young learners was identified as a positive experience. The individual interviews mostly confirmed what had been reported in the group interview. I concluded that the response to this lesson from both learners and educators was generally positive.

This discussion revealed that learners were in the process of developing a moral consciousness; they displayed a sense of justice/ of knowing what was right and wrong and of fairness, although they were unable to provide explanations for these. It also revealed that they understood that actions have consequences. What pleased me was the fact that learners had "experienced," "lived" and "seen values in action" and that they had been presented the opportunity to see the need for positive values in real life situations that they could identify with. They reasoned about actions (although in unsophisticated ways) and responded passionately to what they considered as wrong behaviour.

These responses demonstrate that in terms of Kohlberg's theory, most of these learners were in the pre-conventional stage of moral development which confirms the widely held idea that moral learning is a *developmental process*. In terms of Vygotsky's theory, it underlines the need for strong mediation and the efforts of several mediators to assist in the process of healthy moral formulation. Such combined efforts of mediators can strengthen and extend the development of values (Vygotsky's theory of the

Zone of Proximal Development) and help to develop and form habits of intelligent reasoning about moral issues.

#### **7.4. EDUCATOR CONCERNS**

##### **THE NEED FOR GUIDELINES**

During group interviews and discussions a number of concerns were raised by educators. The lack of clear guidelines on methods on how to teach values in the curriculum and their lack of theoretical knowledge of different approaches to values education emerged as a concern. In contrast to this the group expressed appreciation for the guidelines offered for the moral dilemma lesson. Educator K: *“I felt in control and knew what to do and I could enjoy presenting the lesson.”* Educator C: *“The guidelines gave me a lot of confidence and a sense of purpose.”*

##### **THE INFLUENCE OF EDUCATORS' VALUE PRIORITIES**

Educator CC openly admitted: *“My own values determine my classroom practice. I cannot teach what I don't believe. I focussed on honesty and obedience because that seemed important in this context.”* Educators S: *“I tend to teach the values that we were taught at school and those I teach to my own children because it sets a moral standard for their behaviour”*

This once again confirmed earlier findings which showed that this group of educators did not generally teach all the values prescribed by the curriculum, but preferred those values that they considered worthwhile valuing. A few educators reported not knowing for themselves what some of the values in the curriculum meant, namely “ubuntu,” openness, patriotism and social honour.

The fact that these values were identified by educators as those that they themselves had concerns about, left me wondering if their resistance was a way of dealing with the past, when they were required to pledge allegiance to second-hand citizenship and patriotism which they did not support, but were forced to by the system of apartheid?

## 7.5. THE ASSESSMENT OF VALUES

The educators' portfolios required evidence of the assessment practices of educators. The next section deals with data obtained from the portfolios on the assessment of values. I counted the times an assessment criterion was mentioned for all the topics and tasks in the lesson plans and selected those criteria that were most frequently mentioned.

**TABLE 7**

Topics	Assessment criteria that appeared on checklists
My body	working in groups, enjoyed activity, co-operation/enjoyment
Littering	classify litter, consequences of littering, information/classify
Abuse	co-operation in groups, enjoyed activity, co-operation/enjoyment
Feelings	identify feelings, discuss feelings, sensitivity/identify
Shopping	identify needs and wants, able to colour in, information/motor skills
Religious festival days	Able to connect dots to complete picture, fine motor skills
Diseases	Able to work in groups, enjoyed activity, co-operation/Enjoyment
Nutrition	Able to identify products, work in groups, identification/enjoyment
Places of worship	Name buildings, identify names of holy books information/identify

As Table 7 demonstrates the assessment criteria listed in checklists seemed to be appropriate for assessing skills in doing things and speaking about things. The general tendency in respect of assessment criteria on assessment instruments appeared to focus on the ability of learners to work in groups, to be able to draw pictures, to identify or match items, to indicate whether learners had enjoyed the task or to indicate whether they had contributed to the task. One criterion actually read “cannot colour in nicely” while another read “coloured in over the lines” which implied that “the ability to colour in” (fine motor skills) became a criterion for what was intended to be the assessment of values.

But I have already established that values are not simply understanding what they are, skills or feelings, but refer to a conative dimension that has to do with the will to act in particular ways. An analysis of the criteria showed that most of the criteria assessed “knowing about information on these topics or knowing how to do” things and apart from co-operation, which is generally regarded as a social skill, there appeared to be no reference to dispositional knowledge.

Furthermore the learning activities presented on these worksheets actually became assessment activities as educators used the operations of these tasks, for example the ability to colour in, as assessment standards. Moreover can enjoyment be a criterion for values given the fact that many immoral and unacceptable acts are enjoyed by some people? What was clear to me was that educators assumed feelings, speaking about things, social skills, fine motor skills or enjoyment to be values. Another possibility was that educators were not sure what they were required to do.

I was puzzled by these findings and was faced by several unanswered questions. For example what do educators need to do when they are required to assess values? How could assessment criteria for values be framed? Was it

possible to assess values in terms of the assessment standards and guidelines provided in the RNCS General Education and Training (GET) Grades R-9 (2002) and The Revised National Curriculum Statement Resource Material, Western Cape Education Department (WCED 2003) and the Teachers' Guide for the Development of Learning Policy Guidelines (DoE, 2003)?

In terms of assessment standards the educators followed the guidelines of the above mentioned policy documents. An analysis of taxonomies provided by Bloom (1956), Gagne (1970) and Coltham and Fines (1971) reveals that identification (naming) of Holy books, descriptions of symbols of religions and identification of buildings are cognitive objectives. According to these taxonomies description relates to comprehension and understanding; identification to analysis; and comparison to distinguishing between similarities and differences. While moral learning requires cognition to be able to reason intelligently about values as Lipman (1961) has argued, it also consists of a conative dimension (dispositional knowledge) which refers to volition or "the will to act" as Huitt (1996) has indicated which is currently not provided for, or, if it is, it is not made explicit in the assessment standards.

## **ASSESSMENT TOOLS**

The next question was what assessment tools did this group of educators use to arrive at the rating code that they had assigned to learners for these tasks? Table 8 below shows the use of assessment tools in terms of the percentage of educators who had used it:

Instruments	% of educators who used this tool
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Checklists	53%
Rubrics	27%
Rating scales	13%
Observation	7%

**TABLE 8**

As Table 8 indicates educators preferred checklists. The general reasons expressed by this group for this preference was, that checklists provided them with specific items to assess, while rating scales were generally used for self assessment. In some lesson plans no indication was given of the assessment instruments that were used, and in some lesson plans details of assessment tools were not included but a rating code had been assigned.

While some of these tools were prescribed for the assessment of values in the Teachers Guide for the Development of Learning Policy Guidelines (DoE, 2003: 24) under the heading “How to assess Values and Attitudes” these tools did not seem appropriate for the assessment of values to me. So I started wondering, how could it be determined whether the assessment tools that had been selected, were appropriate to assess values? The literature indicates that it is generally accepted that rubrics, checklists and rating scales provide specifications of what learners are required to demonstrate. So, if this was correct then the assessment tools that this group had used would mostly provide answers to the question: “What do we want learners to be capable of

knowing/doing” but not how they were acting in accordance with what they considered worth valuing.

What this means is that checklists, rubrics and rating scales presented as assessment instruments in policies DoE (2003) and the portfolios ostensibly for the assessment of values and attitudes, only assess knowledge; that is the ability of learners to know about things, show how to do things, or how to make things, but not of their conative qualities: their willingness to act in accordance with the values mentioned in the tasks.

It was interesting to note that observation accounted for a low percentage of the tools used for assessment although it is considered as an appropriate tool (Teachers Guide for the Development of Learning Policy Guidelines DoE, 2003: 24). I asked this group to explain why they did not generally use observation as a method of assessment. The following responses and explanations emerged from the discussion:

Educator K pointed out *“one needs to record all observations in a journal and I don’t always have the time to do this. I have 50 learners in my class so I just don’t bother.”* Educator F explained *“it is time consuming as you have to make entries all the time.”*

The objective of values education is not only for learners to know about honesty, or what to do about honesty sometimes; but for learners to be honest; to act honestly and to value honesty. This is a strong point of criticism against the assessment of values for *how do you develop an assessment instrument to assess “being honest?”* Following from this, how could this instrument (assuming one was available) assess whether one learner is more honest than another?

#### **ASSESSORS**

The curriculum suggests that a number of assessors should be engaged in the process of assessment. Table 9 indicates that educators had themselves assessed most of the tasks

**TABLE 9**

<b>Assessors</b>	<b>Frequency of mention</b>
Educator	61%
Peer	20%
Self	16%
Group	3%

Educators offered the following explanations for this: Educator M explained *“learners were generally not happy when a slow learner had assessed their efforts.”* She pointed out that *“learners generally preferred someone who they thought were brighter than they to assess their work. Learners can be quite harsh at times and make no mistake they know the capabilities of their peers and have their preferences.”*

Educator L offered the following explanation for the lack of group assessment *“projects for group work often created situations where learners who did not contribute to the project benefited unfairly from the efforts of the rest of the group.”* Educator G agreed and added *“learners have often complained that this was unfair.* Educator T agreed *“Yes this is a real headache. It causes a lot of stress and I think this is where some learners get away with the responsibility to do their share of the work. They know that the other learners will do it so they just take the marks.”*

Educator H *“You know it is better to let each learner do his/her own work. It really is much less fuss and bother.”*

A few educators complained that the assessment criteria described in rubrics were confusing at times and even left them uncertain as to what to assess. Several educators agreed that self assessment sometimes resulted in bias towards own efforts or unfair advantage for learners whose parents had access to resources such as the Internet. It appeared that there was a definite link between the high incidence of educator assessment and the power relationships that existed in classrooms. A number of educators explained that peer assessment of activities often led to unhealthy competitiveness, bias, laziness and unreliable assessments that frequently resulted in fights on the playgrounds. Most educators agreed that they considered it inadvisable for younger learners to engage in assessment as learners were generally not equipped to be assessors in spite of the assessment criteria provided for them.

As Educator P pointed out *“how are they supposed to assess the work of a peer who had coloured in a small section beyond the outlines of a picture that they were supposed to colour in? Should they measure the length of the outline that the learner had not coloured in correctly? It is unrealistic to expect this from them.”* Educator X agreed *“some of them are in any case not able to provide much guidance to peers about why they made a particular error and what they could do about it.”*

Educator H did not agree with this entirely *“they may be able to do simple assessments like when a smiling face represents a “yes” and a frowning face a “no” to show that the task had been completed or enjoyed. You know they would even say that everybody in the group had co-operated even if they did not. But they simply lack the ability to assess more difficult stuff and need to be taught how to do this. It may work better with the older ones.”*

## **ASSESSMENT RELATED TO THE MORAL DILEMMA LESSON**

The assessment of values, as was evident from the educators' portfolios and group interviews was a definite problem area. I wanted to establish whether these educators had learnt anything from the moral dilemma lesson that could be helpful in this regard. The question of assessment criteria resulted in heated discussions and angry responses from some educators because they could not agree on the assessment criteria which would be appropriate for this lesson. The angry response of Educator P was: "*What must the child explain? They just answer yes or no.*" The educators generally agreed that: "*they can only say that it is right or wrong but not why it is right or wrong.*"

Educator Q offered the following explanation: "*I think they are too young to know why it is right or wrong so, at this age, it is either right or wrong for them.*" In support of this view Educator S remarked: "*They understand that it is wrong to cheat in this context, but may not be able to apply this knowledge to other contexts.*" The response from Educator P was significant: "*How do I determine criteria if I am not sure how to collect evidence and what will count as evidence in this situation?*" Such responses confirmed the confusion about assessment instruments and assessment criteria that became evident in the educators' portfolios.

The next question of the interview was to explore reasoning about values. Educators were asked to explain what advice they would give to learners in this situation?

Interviewee One: *To tell the educator*

Interviewee Two: *To make their own decision*

Interviewee Three: *I will explain what loyalty and honesty mean and then tell them to choose.*

Interviewee Four: *I think they are too young to choose. I will tell them to go to the educator.*

These responses demonstrated the important role of mediation in values once again. If learners are too young to make choices, then they need to be guided towards using their right to choose, in positive ways and be taught to make good choices. Learners clearly realised that actions had consequences in this context, (they expected punishment) but as a guiding principle for moral behaviour, the question of choice and the will to act in accordance with positive values, was not clearly emphasised in this lesson. If the situation had been approached in line with the “all actions have consequences principle” then options could have been discussed in a way that supports reasoning about values.

## **7.6. NATIONAL CODES AND THE ASSESSMENT OF VALUES**

The National Protocol on Assessment for Schools (2005:5) states: *“Classroom assessment should provide an indication of learner achievement in the most effective and efficient manner by ensuring that adequate evidence of achievement is collected....”* In recording or reporting on learner achievement, the following codes are to be used:

- 4 = Learner’s performance has exceeded the requirements
- 3 = Learner’s performance has satisfied the requirements
- 2 = Learner’s performance has partially satisfied the requirements
- 1 = Learner’s performance has not satisfied the requirements (Assessment Guidelines for the GET Band (Grades R-9) WCED 2003: 11).

In what ways could learners demonstrate, make, do or show that they had become more moral for example or learnt to be more tolerant and then to what extent? Surely it would be absurd to suggest that learners should be given activities that required them to paint tolerance or to colour in kindness. And even if we could, some form of interpretation and explanation would still be needed to measure this. Moreover, tolerance is required in different social contexts and not only restricted to the classroom. How could an

educator monitor and record whether learners were tolerant or not in all of these contexts (the play ground, in the Sunday school, on the sport fields, at home, towards their siblings) to justify a measurement of “have achieved” tolerance or any other value to award the code 4 to a learner?

An article in a local newspaper that has sent shockwaves through a rural community recently confirms this. It describes how two young boys aged eight and ten brutally murdered a classmate on their way home. Teachers were unanimous that, judging from the information on classroom behaviour that was available to them, these boys had never displayed any signs of aggressive behaviour in class. *It seems as if constrained situations like classrooms, where situation-specific behaviour is bound to occur, perhaps do not tell us much about the values of learners.* So, if as this incident demonstrates, assessment of values or behaviour is based exclusively on observation of classroom behaviour and the professional judgement of educators, it may be misleading. The question is what “evidence of achievement” did educators collect in order to measure (assign codes) to learners in respect of values?

Furthermore most theories of how moral learning is acquired, suggest that *moral learning is a lengthy, developmental process* and that where impoverished moral formation exists, as the findings have showed, some learners according to Naude (2008) may never develop to the post-conventional stage of Kohlberg’s theory. It is only in this stage, as the writer explains, that the interests of other people are considered and normal ethical expectations are exceeded. Any society would regard it as irresponsible to provide a driver’s licence to a person who is still in the process of learning to drive. Is the same not true in this case where learners are awarded a code of “have achieved” in values education while they are still in the pre-conventional stage of moral learning? Two educators responded to this as follows:

Educator P was: *“Look I explained before that Life Orientation is not an examination learning area. The learner needs a code on paper so I give him a code. I do what I must do, end of story.”* Educator CC offered the following explanation; *“You must use your own professional judgement. This is what the policies tell us to do you see. So it is actually up to you to decide.”*

When I pointed out the inconsistency between the codes awarded and their descriptions of the behaviour of learners to them, a different picture began to emerge. It is a picture of what they described as “the paper trail”; a system of collecting evidence, writing reports, attending meetings, referrals and more referrals ... thus a system that is avoided by educators. The “paper trail” as educators referred to it, explains the process of support for learners who displayed severe forms of unacceptable behaviour as documented in the Conceptual Guidelines for District Based Support Teams (Department of Education 2005). This document provides guidelines of all levels of support starting in the classroom where the problem is identified. Educators have to identify the situation and record all efforts to provide intervention and support for the learner.

If the situation does not improve, the educator reports the situation to the Internal Learner Support Team also known as the Educator Support Team or the Teacher Support Team, where the case is presented and support is given at school level. Principals, educators, members of the community such as the police, social workers or representatives of churches all offer expertise and recommendations on how to address the problem. After this process educators are required to record evidence of progress in this process for three weeks. If the desired results are not achieved, the next level of referral is to the District Board Support Team. At this level advice is sought from curriculum advisors, social workers, school psychologists and representatives from various disciplines (for example legal, or medical) who will assist with maintenance grants or an interdict if this is required.



Needless to say, there are usually discrepancies between policy and practice and educators pointed out that it is at the institutional level that the process often breaks down. Educators complained that they experienced the process of reporting to the TST as threatening and felt they were being interrogated “*you have to provide evidence of everything.*” For not only did they have to produce evidence to explain the situation, but also describe the kind of intervention and support that they had offered “*often without knowing what to do. I am not a social worker or a psychologist.*” Furthermore, several educators expressed the view that “*reporting at school level created the impression that we are unable to cope with learners. Management sees it as your problem.*” One educator said that “*I cannot do the referral on my own. It is a process and if management does not regard it as serious, the problem is never solved.*” It appears that the referral system or “paper trail” has a significant influence on the assessment codes being awarded.

In chapter three I made a distinction between assessment and measurement of values. I explained that assessment referred to the collection of information about learning which could come from various sources, while measurement refers to assigning numbers to evidence of learning. The following year I did not lecture this group. I asked those educators that I could contact which assessment code they had given to those learners who had been the subject of their values task the previous year. In this way I hoped to get an “unofficial” idea of how measurement been done.

A few of them managed to provide the statistics for their classes. From what they told me, and based on the codes of the progression schedules that became available it appeared that very few of them had recorded code 1 or 2 for learners. Table 10 shows the National Assessment Codes assigned to learners in the Foundation Phase for L.O. at eight different schools.

**TABLE 10**

<b>CLASS</b>	<b>Number of learners</b>	<b>1-34%</b>	<b>35-49%</b>	<b>50-69 %</b>	<b>70-100%</b>
Class A	48	3	3	18	24
Class B	45	1	6	18	20
Class C	45	0	14	21	10
Class D	41	3	12	10	16
Class E	40	4	19	5	12
Class F	42	5	3	14	20
Class G	43	8	2	10	23
Class H	42	1	2	20	19
	Total 346	25	61	116	144

Table 10 suggests that a relatively small number of learners did not achieve the required code for L. O. These findings truly caught me by surprise for these statistics are positive and contrary to media reports that generally present a picture of violence, lack of discipline, disrespect for authority and the collapse of a culture of teaching and learning at schools as pointed out by Kallaway (2007):

The majority of public schools in our country can be regarded as sites of moral panic that highlights criminality, vandalism, bullying and violence, as well as “drop outs” and academic failure.

Newspaper headlines of The Voice (18 November 2007) refer to “Cape Town’s Schools of Violence.” The question is what does the inconsistency between the codes on the official progression schedules of educators, and the values of learners (the will to act in accordance with positive values) suggest?

## 7.7. CONCLUSION

The case study data revealed several inconsistencies about the teaching and assessment of values in this group. In summary firstly, there appeared to be uncertainty about the interpretation of outcomes; secondly, there appeared to be inconsistency in the teaching of values across learning areas; and thirdly, some of the values prescribed by the curriculum seemed to have been neglected. Fourthly, the tasks incorporated knowledge about *understanding* the topics and not of *valuing* those values mentioned in the lesson plans. I concluded that while educators may have intended to teach towards the valuing of values, or assumed that they were doing so, whether explicitly or implicitly, they were perhaps unknowingly, teaching knowledge and understanding about values if that at all.

It was evident that in most instances causes of negative behaviour were described without reference to a lack of positive values. So this seems to suggest confusion about the relationship between negative behaviour and a lack of positive values or otherwise a lack of a moral vocabulary to describe issues relating to morals and values. It was clear that, despite the challenges, educators were concerned about the values of learners. As they did not perceive this to be satisfactory, they attempted to teach values, in some way or other. It is clear that the greatest concern of all these educators, and the value most consistently identified to be absent, seemed to be a lack of respect, followed by unwillingness to co-operate and a lack of responsibility. It confirms that this group regarded respect, responsibility and co-operation as the three most important values which, was also confirmed by their lesson

plans. This seems to underscore their preference for those values that they considered to be important for themselves. It is interesting to note that the values consistently considered to be lacking, could probably be identified as the key values or dispositions needed for the successful teaching and learning of values.

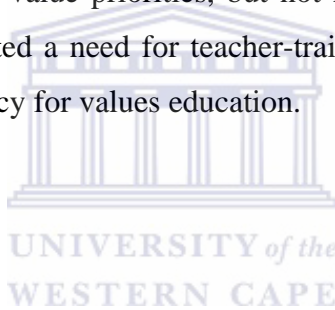
This group of educators identified powerful social factors which militate against informal and formal instruction of values and their information suggests that where impoverished moral formation exists in society, learners tended to respond in the negative ways described by these educators. This group identified the powerful role that the social-economic context plays in the development of a moral consciousness. As Morrow (1989:90) explains: “what seems to people morally right or wrong depends not only on moral principles, but also on their non-moral beliefs, for instance about the likely consequences of policies and actions, and also on the conditions under which they live.”

The two most common intervention strategies suggested by educators were that learners, who displayed negative dispositions, should be referred to school psychologists or social workers as they perceived social workers and psychologists to be more able to intervene in the process of influencing positive values of learners. Was this a desperate signal for support? It appears that for the foreseeable future, the responsibility to teach values is likely to remain with educators and therefore, there is a need for strategies to facilitate the teaching of values. While the lack of theoretical knowledge of educators has been pointed out as a limitation for effective teaching by many authors, few practical suggestions have been offered on how to address this.

The moral dilemma lesson provided educators with the opportunity of using a new strategy to observe how learners thought about and responded to values in a particular concrete situation. It appeared that educators did not extend the lesson beyond the situational context of the classroom. This

clearly underscored a point I made earlier: that learners are required to act morally in different situations and that the teaching and assessment of values cannot be effective if it is restricted to the confines of the classroom.

I concluded that despite many pedagogical challenges and social constraints, the case study indicated that these educators had displayed remarkable insight, sensitivity, sympathy and understanding of the impact and influence that socio-economic forces had on the values acquisition of their learners and the complexities and challenges that confronts them in respect of values education. Furthermore the values task and moral dilemma lesson had broadened their understanding of other possibilities for the teaching of positive values, the need to enlarge their own moral vocabulary and to examine their own value priorities, but not how to assess values. The case study has highlighted a need for teacher-training, effective support services and a coherent policy for values education.



## **CHAPTER EIGHT**

### **DISCUSSION AND RECOMMENDATIONS**

#### **8.1 INTRODUCTION**

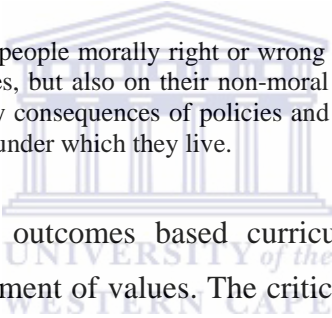
Mouton (1996) holds that the world of social science is only one of the numerous worlds that we inhabit. An important aim of this study is to determine to what extent these worlds speak/ do not speak to each other in respect of values education. In this chapter I will address the research questions by drawing together perspectives from different worlds; international and local literature on philosophy of education, educational psychology, curriculum studies, the policies on values education in South Africa, the curriculum and insights from local practice.

#### **8.2 HOW HAVE POLICY DECISIONS SHAPED THE TEACHING AND ASSESSMENT OF VALUES IN SOUTH AFRICA?**

The inclusion of values education in the curriculum is the result of two concerns; firstly a call for the moral regeneration of society as a result of crime that had become endemic in society and secondly, following from this, the need to entrench democracy more securely in society through its educational institutions. The call to address and stem the tide of crime and criminal activities was led by the Moral Regeneration Movement as was discussed in Chapter two. In answer to the call for moral regeneration from

civil society, several education initiatives were launched to discuss and identify the appropriate values for South Africa to embrace in its educational institutions. The Manifesto on Values Education and Democracy (DoE, 2001) emerged from these initiatives and played a significant role in the inclusion of values in the curriculum and the shaping of values education policies.

It appears that while the issue of the inclusion of values in the curriculum was debated, it was not fully explored. The fact that social contexts differ in South Africa and that socio-economic conditions exert powerful constraints on values formation needs to be acknowledged. This view is confirmed by Morrow (1989:90) who cogently explains:



what seems to people morally right or wrong depends not only on moral principles, but also on their non-moral beliefs, for instance about the likely consequences of policies and actions, and also on the conditions under which they live.

The choice of an outcomes based curriculum has implications for the teaching and assessment of values. The critical and developmental outcomes provide the basis for all teaching, learning and assessment in the curriculum. While values knowledge includes cognitive processes, it has become apparent to me that the critical outcomes are not framed in a way that acknowledges the nature of values knowledge. The implication of this is that it is assumed in policy documents that the critical and developmental outcomes are appropriate outcomes for values education. It follows that if the critical and developmental outcomes are framed in terms of the development of cognitive learning, then the assessment standards derived from these outcomes are appropriate for the assessment of cognitive but not necessarily conative learning.

Furthermore, it is assumed that all outcomes can be captured in a brief description of behaviour and assessed as to whether this is present or not. The

values and actions of human beings are complex and cannot be captured or predicted on the basis of pre-determined behavioural outcomes. The grounding of the OBE curriculum in terms of pre-determined behavioural outcomes resonates with the flawed positivist notion that it is possible to construct universal outcomes which claims that: “whenever x then y” of human behaviour.

The choice of an integrated curriculum has implications and consequences for values education. According to Christie (1997) two different meanings were borne by the term integration; integration of certification and curricular integration. As a consequence of integration, training and education discourses were merged and the new discourse that developed from this merger, does not speak comfortably to a values education discourse. The emphasis on the terminology of training that is apparent in the integration discourse, has marginalised what is distinctive and constitutive of (values) education as a process which includes the acquisition and application of diverse knowledges (cognitive, motor and conative) and whose aims extend beyond mere training. A values discourse just does not seem to speak comfortably to a discourse of pre-determined outcomes, demonstrable competences, observable evidence and measurement of learning.

A competence-based approach to learning is usually associated with demonstrable and measurable evidence according to pre-set assessment standards and criteria. This is the interpretation of competence favoured within an OBE curriculum. It is impossible to evaluate competent performances in values education precisely and accurately given the complex nature of values knowledge. The construction of knowledge, as is commonly known, occurs within particular value orientations, so values are part of any performance since values influence the ways in which an individual process information cognitively and emotionally and spiritually. Values refer to processes that happen in the head, heart and soul, which are not directly observable and which logically, should fall outside the interpretation of



demonstrable competence that is embedded in OBE. It becomes problematic for values education when competence is narrowly construed in terms of demonstrable competence which may obscure other worthwhile outcomes.

The most profound challenge that values education in democracies has to confront is how to reconcile the tension between freedom to choose personal values and a commitment to common democratic values (Forster, 2001.) The curriculum favours a constructivist understanding of teaching and learning which provides freedom in terms of value choices to both educators and learners. Personal value choices do not necessarily align with democratic values and this raises issues about the limits of freedom of individual choices (teachers' freedom to teach) in democratic contexts.

Values education has been conceptualised as both a means to deal with negative values and to nurture positive values. The curriculum focus seems to be primarily on the latter and seems not to have taken into account sub-cultures with competing value orientations that exert powerful influences of values formation. Educators need to be trained to deal with both the former and the latter. The decision to assess values by assigning codes to values knowledge (measuring and quantifying it) is extremely problematic, highly debatable and appears to be logically impossible. I have found no evidence in the literature that suggests that it has been satisfactorily resolved in any country and so I conclude that the measurement of values should be clarified in continuing, rigorous, academic debate.

### **8.3 WHAT CONCEPTUAL UNDERSTANDING OF VALUES AND VALUES EDUCATION CAN FRUITFULLY GUIDE POLICY IN RESPECT OF THE TEACHING AND ASSESSMENT OF VALUES?**

The study shows that there are a number of often unexamined assumptions about the concepts of values and values education. Failure to recognise, acknowledge and consider these will hamper any attempts to formulate

coherent policies for values education. Conceptual analysis of the term values education reveals considerable differences of interpretation and understanding of what is subsumed under this term. While different meanings are assigned to values and values education, it is evident that irrespective of how values education is construed, most interpretations consistently show a relationship between certain values and notions of citizenship. Waghid (2004) alerts us to different uses of the term citizenship that have become embedded in educational discourses through the introduction of concepts such as “democratic” citizenship.

The South African Constitution refers to critical and democratic citizenship but Waghid (2004) points out that the notion of democratic citizenship needs to be extended and should be informed by compassion and justice. It is expected that a society with caring and compassion as its central values that informs citizenship, is one that will challenge and dismantle barriers that have historically been erected and tolerated.

The Manifesto and the curriculum have identified certain values, but there seems to be no common agreement on which values should be given priority in schools and for what reasons. Rorty (1990a) points out that education covers two entirely distinct but related processes; socialisation and individuation and claims that socialisation must precede individuation.

Dewey (1966) claims that it can never be the function of lower education to challenge prevalent ideas of what in a society is held to be true, while Mitchley (1991:45) points out that “children must take what society can give them and learn how it works before they can hope to change it.” Bak (2004:45) agrees that the socialisation process is of necessity a process of ‘thin’ democracy and holds that it is inappropriate to include democratic principles such as equity, equality and autonomy in the socialisation process. It is also not clearly spelt out in policy documents whether learning area specific values might be assessed. If these views are correct and I believe that

they are, then there is a need for ‘thin’ democracy; the imposition of values such as respect, caring, honesty and compassion on younger learners. The implications are that some of the values that are identified in the curriculum may not be suitable for younger learners and that common social values should rather be prioritised in primary schools.

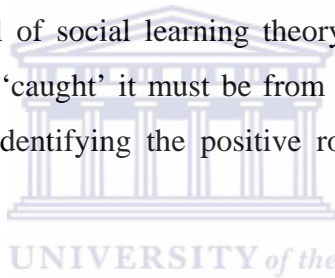
While the curriculum appears to be modelled on Ryle’s framework of different ways of knowing, it is insufficiently clarified in respect of the nature of values knowledge as explained by Ryle. This framework illuminates the nature of values knowledge and points out how values can be conceptualised in different ways and the implications of particular conceptions of values knowledge, for the teaching and assessment of values. It demonstrates the important point that while values knowledge is a distinctive category of knowledge, it includes other knowledges. It also illuminates the point that the emphasis on demonstrable competence presents a challenge to values knowledge as the nature of values knowledge does not sit comfortably with notions of visible evidence and demonstration of competence. While the notion of integrated competences might theoretically be accommodated in values education, the notion of measurement of integrated values-related competences is problematic.

It is evident that the inclusion of values education in the curriculum was influenced by the Moral Regeneration Movement and it could be seen as an education initiative to root the notion of democratic citizenship firmly in society. But the fact that values education inevitable, has a political role to fulfil must be acknowledged.

While certain aspects of the complexity of values education were signalled by some critics who for example claimed that values are ‘caught rather than taught,’ the epistemological and pedagogical complexities embedded in values education were not fully explored and considered during the curriculum policy development process.

#### **8.4 WHAT THEORIES OF LEARNING CAN APPROPRIATELY BE APPLIED TO THE TEACHING AND ASSESSMENT OF VALUES?**

Various psychological theories of learning suggest different approaches for the development of learning. Behaviourist theories assume that moral knowledge is acquired in the same way as other knowledge, either through the strategic use of rewards or by observing the behaviour of others and the rewards it elicits. This approach has been criticised in view of the fact that learners may behave pro-socially only to receive rewards and not from any inner conviction to behave in pro-social ways. It is important however not to ignore the potential of social learning theory for the teaching of values. If positive values are 'caught' it must be from some respected role model and this suggests that identifying the positive role models of learners may be instructive.



Kohlberg's (1963, 1981) research is based on studies of the moral judgements that individuals make when confronted with a hypothetical moral dilemma. He believes that the ability to make moral judgements depends on the capacity to reason and that moral development is part of a natural maturation process that occurs in stages. This process can be facilitated but not unduly hastened. Kohlberg's account of how people develop through these stages is linked to Piaget's theory of cognitive development. The aim of this approach is to strengthen the reasoning capacity of learners through discussion and deliberation so it is learner-centred as it allows learners to take control of their own learning. The curriculum is aligned in terms of constructivism but does this mean that learners have the freedom to construct their own values?

The values clarification approach, which is strongly influenced by individualist Piagetian views, also claims Kohlberg's theory. This approach

assumes that values are a matter of free personal choice and it rejects any attempts from religion, society, politics or tradition to impose values on the young which is in sharp contrast to Dewey and Rorty' views that during the socialization phase there is a need to impose boundaries and that freedom needs to be restricted. This approach has been condemned because of its obvious lack of concern for the values of others.

Kohlberg's theory has been criticised because it describes moral judgements rather than moral action and moral dilemmas are not resolved by moral judgements. Despite these criticisms Kohlberg's theory does illuminate the fact that moral development is a process and that learners are able to respond to moral issues if provided with relevant thinking tools and opportunities to use them.

Vygotsky (1978) believes that the process of learning needs social interaction with others during which the content of learning is negotiated and renegotiated; constructed and de-constructed. This social constructivist view presents a challenge to the individual constructivist theories of Piaget and Kohlberg as it introduces and stresses the role of mediation. Vygotsky places emphasis on the role of language which points to the importance of the development of a moral vocabulary and mediation by various members of society. Vygotsky's theory suggests that we have a collective social responsibility in mediating moral issues to learners.

Authoritarian approaches assume that it is possible to teach values through dictation; simply telling learners what to do. They rely on direct instruction and behaviourist approaches of rewards and punishment. It is important to note that if the intention of values education is to facilitate moral learning then those theories that support the development of moral reasoning, the acquisition of a moral vocabulary and the mediation of values by members of society need to be used in conjunction with behaviourist approaches.

The most frequently mentioned strategies are the use of stories, engagement in various forms of discussion, extra-curricular opportunities to act compassionately, rewards and affirmation. I did not find any strong claim in the literature that suggests the guaranteed success of any single approach as practices in values education tend to consist of a combination of these theories of learning and teaching strategies. The theoretical orientation of the educator's training, or lack thereof, the educator's own personal views and experiences of how values could be taught, as well as the values prioritised by educators exert strong influences on their practices.

The efforts of educators to teach values in schools are often frustrated by lack of support from families and communities who do not share the same democratic value orientations. The rights of learners have also been identified by educators as a constraint to their efforts to teach values in schools. The tendency seems to be to conceptualise the rights of learners in terms of absolute rights without due consideration of the rights of educators. This tension which has not been taken into account in the policy development process is in need of urgent attention and resolution, as it has the potential to lead to moral minimising and moral diffusion on the part of educators as the case study has suggested.

I did not find strong support for either the assessment or measurement of values in other countries except in South Africa as the desirability of the assessment of values is contentious and not agreed on. The literature indicates that views about assessment in other countries fit into three categories; values should not be assessed, values are too complex to be measured or values can only be assessed to a certain extent which resonates with my own conclusion.

Different forms of assessment differ in terms of its purposes and practices. The distinction between assessment and measurement of values as provided by Mouton (1996) and Kaplan (1964) has served to illuminate these concepts

and has provided an instructive perspective to the study. While assessment usually involves the collection of evidence of learning in schools and even in everyday life, this may not necessarily include measurement. Measurement is therefore just one form of assessment and it is appropriate only in some cases. It does not seem appropriate as a means of assessing dispositional values knowledge.

This point was noted by Carrim and Keet (2005) who point out that if the brief to infuse human rights and values in the curriculum meant that it was only limited to propositional and procedural knowledge, it is possible to assess it in the same way as knowledge and skills. But because the working group had conceptualised the assessment of human rights and values as different from the assessment of only propositional and procedural knowledge, this conception could not be accommodated within a notion of assessment that included the measurement of values. They found the brief to infuse human rights and values into an OBE curriculum that makes no distinction between assessment and measurement of values problematic. Other objections that are raised against the assessment of values in the literature are that it is immoral to assess the values of individual learners, that values knowledge is too complex for statistical measurement and that there are no instruments available to measure values acquisition..

In the case of the assessment of values one need to ask what purposes can be served and what is possible? The literature indicates that the desirability of assessing values is questioned everywhere and remains the subject of ongoing debate. In terms of what is possible, it depends on how human rights and values are conceptualised as Ryle's framework demonstrates. So the question to be considered is; is it possible that other assessment options are possible if the teaching of values is done differently?

The framework of Ryle indicates that three teaching possibilities are available:

- Teaching knowledge about human rights and values
- Teaching how to access human rights and values
- Teaching towards the valuing of human rights and values

If the first two possibilities are favoured then assessment of values could be aligned with measurement. If the third possibility is favoured, then assessment with or without measurement becomes problematic as this raises the question of evidence of learning. So I am not sure that values could be assessed and measured with precision irrespective of how it was taught.

My overall impression is that policy documents do not address the assessment of values in any comprehensive way by providing guidelines for educators to follow and much is left to the discretion and professional judgement of educators. A Teacher's Guide for the Development of Learning Programmes Policy Guidelines Life Orientation (DoE, 2003:24) offer the following advice pertaining to the assessment of values:

Values and attitudes are difficult to assess because they refer to internal states that are closely linked with emotions....From the learner's external actions and behaviours one can infer his/her internal state.

These guidelines are directly the opposite of what theories of moral learning and Ryle's framework suggest; knowing about values or even acting on this knowledge does not automatically translate into moral action as the guidelines assume.

Kohlberg's (1994) stage theory provides insight into different stages of moral development which is consistent with the educational processes of socialisation and individuation as explained by Rorty (1990) and Dewey (1964). Vygotsky's view that several mediators are needed to mediate values aligns with the views expressed in the curriculum and educators who regard



values education as a shared social responsibility. Ryle (1971) suggests that values can be ‘caught’ by emulating the actions of others. This is consistent with the social learning theory of Bandura (1974) which implies that values can be ‘caught’ from positive role models. Huitt (1996) draws our attention to the conative dimension of values, the human will that represents a distinctive part of the human psyche. Ryle (1971) believes that the will is educable and can be trained to acquire preferences for pro-social behaviour.

The perspectives and insights gained from Rorty (1990) about socialisation, from Vygotsky’s (1978) social constructivist theory and Bandura’s (1974) social learning theory, indicate that social influence is considered to be a key determinant of value formation by philosophy and psychology. There is therefore strong convergence between the views of philosophy and psychology regarding the teaching and acquisition of values. Both disciplines, despite their different epistemologies, agree that values can be taught, but that the teaching and learning of values cannot be restricted to lecturing or dictation of knowledge about values. It appears that in terms of the conceptualisation of values education, the curriculum needs to be more firmly grounded in the theories of learning as advanced by Vygotsky, Kohlberg, Bandura and Ryle.

## **8.5 WHAT CAN PERSPECTIVES OF LOCAL EDUCATORS CONTRIBUTE TO A CONCEPTUAL ANALYSIS OF THE TEACHING AND ASSESSMENT OF VALUES?**

The case study presented the teaching and assessment practices of a group of educators in a unique setting which may not be typical of teaching and assessment practices generally, but certain aspects of their practices may nevertheless be recognizable. The case study showed that educators accepted their role as moral educators partly because of the requirements of the Norms and Standards for Educators (DoE, 2000) but mostly because they are concerned about the values of learners. Two kinds of practices of the teaching

and assessment of values were identified in the case study. Firstly the teaching and assessment of values were done strictly according to curriculum guidelines and secondly, according to educators' own professional and personal insights. Values education was noticeably more focussed on dealing with negative values than the nurturing of positive values and it was not surprising that respect was consistently identified as the most important value.

The powerful role of social influences was singled out as a major factor that contributed to negative values formation. The educators expressed a lack of confidence in their own abilities to teach positive values and believed that psychologists and social workers were better equipped to deal with the social problems that often resulted in negative behavioural patterns. This shows the divergence between expectations and assumptions of authorities and educators' own sense of competence; a case of high expectations but poor preparation.

Educators indicated that they found the assessment of values problematic as they did not understand how this should be done, but they tried to follow the curriculum guidelines. The teaching and assessment of values are thus aligned in terms of the recommended curriculum practices but not consistently in terms of values education principles. In some instances the views expressed by educators particularly with reference to the moral dilemma lesson were aligned with theories of learning as advanced by Kohlberg and Vygotsky although they were not aware of it.

Teaching practices of educators tend to be behaviourist and in some instances authoritarian assumptions were not far off. Educators were very aware of modelling as a strategy for teaching values and they identified the absence of positive role models as a cause of negative behavioural patterns. Educators were receptive to alternative approaches and they were appreciative of clear

guidelines that unambiguously explained what and how they were required to teach.

Educators reported that the assignment of national codes did not make sense to them. The codes that they assigned were based on the written tasks and projects that the learners had presented for LO. The case study revealed that these tasks mostly assessed cognitive operations and not values. Educators could not clearly explain the way in which values had been taken into account in the assignment of the codes. The most common explanation offered was that the behaviour of learners was monitored over a period of time, that changes in behaviour were documented and that codes were assigned on the basis of this evidence. How this evidence could be quantified remains unclear. Nevertheless this indicated that educators understood the assessment of values as summative rather than formative. This raises the question of whether the assessment of values is included in the codes assigned for LO or for any other learning area across the curriculum.

## **8.6 RECOMMENDATIONS THAT MIGHT ENHANCE THE TEACHING AND ASSESSMENT OF VALUES IN LOCAL SCHOOLS**

### **CONCEPTUALISATION OF VALUES EDUCATION**

The first recommendation resonates with Kohlberg (1963:57-58) who recommends the following concerning the teaching of values:

If I could not define virtue... then could I really offer advice as to the means by which virtue could be taught? Could it really be argued that the means for teaching obedience to authority are the same as the means for teaching freedom of moral opinion...? It appears, then, that either we must be totally silent about moral education or else speak to the nature of virtue.

Kohlberg's recommendation that we need to define the nature of virtue resonates with my own recommendation that there is a need for on-going in-

depth analysis of the meanings ascribed to ‘values education’ by all the different role players involved in education.

The study shows that the conceptualisation of values education can significantly determine the practice of values education. It is important to recognise up front the lack of alignment of curriculum requirements and the demands of values education policies and to plan how to overcome this. The framework presented by Ryle demonstrates that different conceptions of values education have implications for the teaching, learning and assessment of values education. It is recommended that this framework should be used to identify the possibilities and options available for the teaching and assessment of values.

In respect of the teaching of values the insights and experience of educators, as well as the important role of positive social models as suggested by Bandura must be taken into account. Discussion, deliberation, respectful disagreement, together with the exploration of moral concepts and the expansion of a moral vocabulary needs to be included as essential aspects of values education. The need for improved guidelines in respect of the teaching and assessment of values is recommended as an urgent priority.

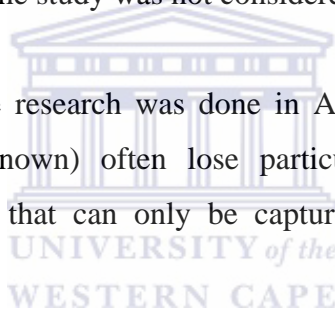
## **8.7 REVIEWING THE RESEARCH PROCESS**

### **8.7.1 LIMITATIONS OF THIS STUDY**

#### **CONCEPTUAL AND LOGISTICAL ISSUES**

The scope of the thesis is broad and it was extremely difficult to set boundaries to. As a result of this it was not always possible to maintain a favourable balance between chapters or to give in-depth attention to all the relevant issues.

- The case study approach is often criticised as findings cannot be generalised. But since the case is simply an illustration of a particular perspective, no claim is made that the findings are generalisable, although other educators facing similar challenges may benefit from the insights developed in this study.
- The fact that the case study was in a sense a convenience sample could be seen as a limitation. Moreover the teaching of the moral dilemma lesson by a small number of educators is a weakness of this study. The logistical problems associated with the number of educators that were required to participate in the lesson per school, proved that this was not a practical option. Generally the design of this part of the study was not considered carefully enough.
- Most of the research was done in Afrikaans and translations (as is generally known) often lose particular nuances and richness of expressions that can only be captured and conveyed in a mother tongue.



## **8.8 PROPOSALS FOR FUTURE RESEARCH**

- I have chosen to exclude the role and influence of religion on values formation which could be seen as a limitation of this study. Schools are secular multi-religious institutions so this is an area for future research.
- Case study research is needed that will demonstrate to learners the consequences of negative values and poor value choices in the lives of gangsters and criminals.
- Case studies that document the lives of positive role models may teach valuable lessons to learners.

- Research which focus on assessment strategies for values education

## 8.9 CONCLUSION

The aim of this study was to explore the teaching and assessment of values within an OBE curriculum in South Africa. While the findings show strong support for the teaching of values in spite of constraints and limitations, the measurement of values within an OBE curriculum seems to be a logical impossibility. This is not to say that the assessment and measurement of values per se is impossible as propositional and procedural knowledge about values can be assessed and measured. The measurement of dispositional knowledge is fraught with uncertainties. There is no instrument to measure 'knowing to be', criteria would be difficult to establish and formulate in operational terms, and it would require knowledge about learners' conduct over time and in different contexts.

Matthews (1978: 185) with regard to the assessment of values cautions:

...let us at least be honest in this business; let us not make claims for educational objectives which are incapable of verification, and if we do assess values, let the assessment have some known and commonly accepted basis.

The question of whether virtue can be taught has been asked by philosophers ever since the days of Aristotle. This study has extended the question by asking if values can be assessed. These are philosophical questions and what often defines philosophical questions is the fact that they seldom have conclusive or permanent answers, and that at best, answers have to be negotiated. Flavell (1977:1) cogently points out that:

"The really interesting concepts of this world have the nasty habit of avoiding our most determined attempts to pin them down...Their meanings perversely remain

multiple, ambiguous, imprecise and above all, unstable and open- open to argument and disagreement...”

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## APPENDIX A



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### EDUCATORS' QUESTIONNAIRE

Key: 1 - Never 2 - Seldom. 3 - Sometimes 4 – Always

B= behaviourist      D= discussion      M=modelling

Type	Description of approach	Never	Seldom	Sometimes	Always
		1	2	3	4
B	Punish offenders for bad behaviour	22	12	14	52
B	Insist that rules are obeyed	0	0	14	86
B	Warn learners of the consequences of wrong behaviour	0	0	28	72
B	Discuss wrong attitudes	0	0	42	58
D	Read stories that illustrate bad attitudes	0	20	26	54
D	Read stories that illustrate good values	0	0	31	69
M	Discuss good role models	0	12	39	49
M	Praise good behaviour	0	0	32	68
B	Praise improved behaviour	0	0	38	62
B	Reward evidence of responsible behaviour	0	0	41	59
B	Discuss moral dilemmas	65	24	11	0
M	Model the values that you teach	0	20	34	46
D	Address issues of values in your class	0	24	36	40
M	Ask learners reasons for their behaviour	0	13	33	54

## APPENDIX B

### Moral Dilemma

OUTCOME: I make good choices.

#### “YOU OWE ME”

Peter angrily kicked some stones out of his way as he reluctantly made his way to school. Today was Friday and they would be writing a class test so he was not in a hurry to get to school.

He did not study for the test as he had been so busy practising for the school's athletic meeting. He is an excellent athlete and everybody expected him to win all the events of the competition. He did not want to disappoint his school so he attended all the practise sessions and that left him with very little time to study his work.

“Maybe the teacher would be absent today or maybe there would be another power failure as it has happened often in the past and we will not write the test” he thought to himself. Suddenly he thought of his friend Eben who was a hardworking learner and often scored good marks in tests. “Maybe he would help me just this once if I asked him to” Peter thought. Peter began to walk faster as he had to speak to Eben before the test. Eben sits right in front of him in class and if he would just have to move his book a little to the left then Peter would be able to see the answers. He would not copy all the answers just a few to help him to pass the test. Nobody would know; it would be their little secret.

A little later he noticed Eben and when he was close enough he tugged at his arm. He explained to Eben how he had to spend all his time at practise sessions and why he had had no time to study. Eben listened and then exclaimed; “Oh No! What would happen if we are caught?” He pushed Peter away and walked towards the classroom. Peter was very angry with Eben because he did not even care about the fact that their school had won the athletic meeting because of the efforts of athletes such as him. “Eben is not a true and loyal friend” thought Peter “because loyal friends would do anything for each other.”

Then he saw Gavin. They were team mates in the school's relay team that had done so well at the athletic meeting. “Hello Gavin” Peter greeted him. “Are you ready for the test?” to which Gavin replied “it was hard work and I was up very late last night but I tried my best. “Would you help me with the test please” Peter asked Gavin. “Nobody would know and we will not be caught out.” “No Peter” Gavin replied “I could not do this even if nobody was watching us.” Just then Susan came along. She liked Peter and admired him because he was such a fine athlete. She was always prepared to help him. Peter asked her to help him. She thought that it was unfair that



he had to spend such a lot of his time in practise sessions and that he had had no time to study. “I will help you just this once” she replied.

During the test Eben saw her helping Peter. They were both unaware of this but Eben was very angry as they left the classroom at playtime. He knew that some learners often copied the work of other learners during tests. What should he do? Should he tell both of them that he knew what they had been up to? Should he tell the teacher? Should he just say nothing? What was the right thing to do?



## APPENDIX C

### QUESTIONS FOR INTERVIEWS

1. What did the learners say immediately after you had read the passage to them? What was their first reaction to the passage?
2. Did they encounter any difficulties in understanding the content of the passage? If yes how did you deal with such difficulties?
3. Were your learners able to identify with this dilemma? Did they relate some of their own experiences? Elaborate on this.
4. Could your learners or name/identify the values presented in this lesson?
5. How did they understand the meaning of “honesty and “loyalty” in the context of this passage? Did they ask further questions?
6. Were they surprised that there were different opinions of what it means? Elaborate on this.
7. Were you surprised by some of the responses? Elaborate on these.
8. Could your learners recognise that in some situations values can clash? What did they say?
9. What did they consider to be the best solution for the situation? What were their reasons for not considering the other options?
10. Thinking from within an OBE framework what are the strengths and weaknesses of lessons based on moral dilemmas.

