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“The real and the ideal”: teacher roles and competences in South African policy and practice

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Abstract

Policy-makers have placed great faith in education as a means of transforming and developing South African society. Recent policy documents specify occupational, professional and academic roles and competences for teachers. These documents require a significant shift to “extended” professionalism. Do these roles and competences resonate with current classroom realities and practices? This question was addressed by mapping the practices of “effective” teachers onto research schedules based on the six major roles prescribed by policy. In practice, teachers assumed roles that were more in accord with personal value systems, local cultures, and contexts. Some significant disjunctions at the interface of policy and practice raise serious questions about policy assumptions. “Tissue rejection”, a not unlikely possibility, would jeopardise the curriculum edifice upon which transformation and development depend. Worse, historically unequal schools could become more so. © 2000 Elsevier Science Ltd. All rights reserved.

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1. Introduction

1.1. Education change, and the policy/practice interface

One of the most daunting challenges facing South Africa’s first democratically elected government was the transformation of apartheid education. The new government inherited a fragmented, racially-polarised, profoundly unequal system of education. In 1994 there were 19 racially-defined education departments, and nine examining bodies in the school system. Non-formal training was largely ad

hoc, and poorly articulated with the formal education system (Kraak, 1998). Apart from the obstacle of systemic incoherence, a malformed economy provided an inadequate resource base for a burgeoning school-going population which increased from 3.5 million to almost 12 million between 1976 and 1996 (Taylor and Vinjevoold, 1999: 25).

Some 5 years later, however, the state has in place a comprehensive and ambitious set of education policies. Education legislation with respect to the curriculum rests on two pillars: a system of outcomes-based education known as “Curriculum 2005”,¹ and a National Qualifications Framework

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¹ The new outcomes-based school curriculum is called “Curriculum 2005” as it is envisaged that it will be operational in all grades by the year 2005. Learning is governed by 66 specific learning outcomes which fall into eight learning areas; and

(NQF). An NQF offers the possibility of extending educational opportunities to the whole population in a way that redresses the ravages of apartheid and addresses the social, political and economic future of the country. The curriculum edifice constructed by policy depends crucially on the NQF and on successful outcomes-based practices, and assessment practices in particular.

These policy approaches have been both imported and indigenised in recent education policy discourses. As Christie (1997) notes, there has been an interesting interplay between global imperatives and local resources, risks and opportunities. It is not surprising, therefore, that although South African policy draws on developments in countries like Australia, England, New Zealand and the USA, it has features which are very different from those of the countries of origin.

One of the most notable differences between South Africa and the countries from which policy is drawn lies in policy implications for teacher professionalism. Since Braverman (1974), a strong body of opinion has argued that teaching in developed countries has become proletarianised and deskilled. In the USA, for example, Apple (1986) and Apple and Jungck (1992) have consistently argued that schools, teachers and curricula have become increasingly tightly controlled and subject to standardisation and reductive accountability. In the UK, it has been argued that the National Curriculum has “de-intellectualised” the teaching profession (Kelly, 1989: 183). In arguing for an ideal, Hoyle (1997) continues to make the case for teacher professionalism, but Harris (1997) counters with the argument that postmodern conditions have reduced teacher autonomy to a state of proletarianisation. Hargreaves (1994: xiv) reflects the views of much informed opinion when he argues that government has incrementally inflicted defeat on teachers by reducing their discretionary judgements “in the circumstances and with the children they know best”. Outcomes-based education, by delimiting curriculum content,

contributes to the deskilling of teachers (Smyth and Dow, 1998).

A reverse process is being attempted in South African education—from deskilling and proletarianisation, to reskilling and professionalisation. Whereas education under apartheid encouraged teacher conservatism and compliance, new curriculum legislation increases teacher autonomy and professional discretion. For example, seven generic “essential” outcomes inform all teaching and learning, and these are intended to permeate specific outcomes at every level of the NQF. However, outcomes are to be achieved by means that are left entirely and explicitly to teachers. Official departmental booklets explain:

The new curriculum does not provide detail about content... Educators are recognised as professionals who can make curriculum decisions in the best interests of learners and who do not have to rely on the dictates of a centrally devised syllabus. This means the same outcomes can be achieved through a wide range of learning activities and contexts and educators must choose the content and locate the activity in contexts of relevance for their particular learners.²

The teaching and learning strategies which will mediate the learning are the responsibility of the teacher and must reflect the learning outcome.³

Given the generality of the seven “critical” or generic outcomes—such as “Identify and solve problems in which responses display that responsible decisions using critical and creative thinking, have been made”—the demands on teachers’ skills and professionalism are considerable. For teachers working in impoverished schools without textbooks and electricity the nature of the challenge becomes exponentially daunting. Such schools are

seven generic outcomes inform learning at all levels. The curriculum requires teachers to plan and design learning programmes which are informed by the set outcomes, and to implement criterion-referenced, continuous assessment.

² See *Implementing OBE-Book 4, Philosophy* (undated), Department of Education, Pretoria, South Africa: 25.27.

³ See *An Outcomes-based Approach to Educational and Curriculum Development in South Africa* (undated), Department of Education, Pretoria: 13.

numerous. According to the 1996 “School Register of Needs”, only 17% of South African schools have libraries, and only 41% have electricity (Bot, 1997).

If curriculum policy is premised on measuring what learners are able to do, it stands to reason that policy would also have to specify what teachers should be able to do. Indeed, the roles and competences of teachers have recently been outlined in four new policy documents. With respect to the curriculum and teacher development, then, a clear set of policies for transformation and development is firmly in place. However, as we know, policy has to be effected in a world that is real rather than ideal, and in education the difficulties associated with policy-into-practice are legion.

In concluding a comparative study of professionalism, Broadfoot et al. (1988: 265) conclude that:

[Policy]...attempts to change teachers’ practice without due regard to those conceptions of professional responsibility which are deeply rooted in particular *national traditions* as well as more general *classroom realities*, will result in a lowering of morale and decreased effectiveness. (our emphasis)

A number of more recent studies in developing countries highlight the significance of this judgement. In an exploration of the policy/practice interface in pre-service teacher education, Ratnavadivel (1999) reports that classroom realities overrode the new tenets of progressive teacher education in Malaysia. Student teachers defined teaching in ways that privileged the imparting of knowledge and completing the lesson plan rather than in ways that focused on student learning. Similarly, a case study of the “Operation Blackboard” innovation in Indian primary schools concludes that the innovation failed because of the low level of teachers’ professional skills and their exclusion from decision-making (Dyer, 1996). Policy was insufficiently sensitive to the different contexts in which it was to be carried out, and some contexts were simply not receptive to the child-centred practices outlined in policy.

In Botswana, Tabulawa (1997) attributes the

failure of reform to its oversight of historically-entrenched authoritarianism on the part of teachers. The new learner-centred pedagogy threatened teachers’ taken-for-granted classroom worlds. Teachers defined teaching as a process of imparting school knowledge and making sure there was sufficient classroom order to make this possible. Students’ descriptions of their roles “were consistent with their understanding of learning as a process of receiving the teachers’ knowledge” (Tabulawa, 1997: 201). In short, classroom reality favoured a “banking” model of education (Freire, 1972) and rendered policy expectation of learner-centredness an unlikely possibility.

Running through these studies are the twin threads of national tradition and classroom reality (both existential and as defined by teachers). Against this background, it is not surprising that in their article “Transforming education in South Africa?” Enslin and Pendlebury make the point that:

...formal changes cannot guarantee better practice, and where the policy makers take little account of the *context* and *agents* of implementation, policy may impede rather than enable transformation. (Enslin and Pendlebury, 1998: 262, our emphasis)

It may be assumed that policy makers in Africa have not taken account of the context and agents of implementation:

The evaluation of many World Bank policies has revealed a great discrepancy between their policies and what happens on the ground, especially in Africa. (De Clercq, 1997: 129)

Is South Africa, with its comprehensive policy on curriculum and teacher roles, destined to add to the statistics on the failure of reform? This article reviews policy governing teacher roles and competences, and reports on empirical fieldwork in which teacher practice was compared with policy expectation.⁴ This comparison leads to an account

⁴ This research undertaken by the School of Education, Training and Development at the University of Natal, Pietermaritzburg, was a project of the President’s Education Initiative,

of four broad emergent themes. The article concludes with a discussion on the implications of disjunction at the interface of policy and practice.⁵

1.2. Research design

A detailed analysis of the four relevant policy documents⁶ yielded 48 discrete competences in six broad categories which teachers should fulfil. Research instruments based on these competences were developed concurrently with the policy analysis.

With the assistance of the Pietermaritzburg regional education authority in the province of KwaZulu-Natal, a sample of six “resilient” schools (Christie et al., 1997), representing a cross section of state schools, was identified. Three of the schools were urban, being close to the city centre, one school was peri-urban and two schools were rural. In turn, through internal processes, the schools themselves identified a number of “effective” teachers who were prepared to participate in the research programme.⁷ The decision to work with “effective” teachers was based on the reasoning that very little about the policy/practice interface would be learnt from dysfunctional or ineffective teachers. Clearly, the decision to conduct research with a select sample teachers has major implications for the way in which findings are interpreted.

In September 1998 researchers spent one week with each of the ten teachers in the sample, observ-

ing lessons,⁸ recording data on an observation schedule, and engaging teachers in discussion on those roles and competences which were not directly observable. Fieldwork was concluded with a formal interview at which researchers compared their findings with teachers’ own perceptions.

2. Policy: the roles and competences of teachers

Policy construction of teacher roles is inscribed within the NQF and Curriculum 2005. In this sense, teacher roles are an integral component in the regulatory framework that integrates education and training through the concept of lifelong learning and the practices of outcomes-based assessment.

To capture policy construction of the ideal educator, we analysed the four new policy documents which together define and regulate the professional duties and conduct of educators, and provide frameworks for their professional development and appraisal. Although each document serves a distinct purpose, what they all have in common is the use of the concepts of roles and competences (though not necessarily in these exact terms) in drawing up the various criteria of professionalism. The *Norms and Standards for Educators* (Department of Education, 1998) is the most comprehensive and detailed of the documents as it attempts to incorporate and integrate the roles and competences outlined by the other three documents. For this reason, it was used as the primary resource in the development of research instruments.

What follows is a brief description of each document, noting the categories each one uses to describe the criteria of teacher professionalism.

managed by the Joint Education Trust and funded by the Danish International Development Agency.

⁵ The analysis also draws data from a study entitled “Towards a grounded theory of teacher development: a study of the narratives of rural primary teachers in KwaZulu-Natal” (Jessop, 1997). This PhD study provides an illuminating analysis of the conceptual frames out of which teachers conduct their professional lives.

⁶ The detailed analysis is reported in Barasa and Mattson (1998).

⁷ Broadly defined, the research team defined “effective” as involving public recognition of being “good”, achieving good examination results, and contribution to the school’s resilience.

⁸ The ten secondary school teachers taught the following subjects: Business Economics (1), Biology (1), Physical Science (3), History (3), English (1) and Trades Training (Metalwork, Motor Mechanics and Woodwork) (1). “Curriculum 2005” currently specifies learning areas for Grades 1–9 only.

2.1. National Department of Education Duties and Responsibilities of Educators⁹

The purpose of this document is to provide a job description for each post level against which an educator may be legally appointed, promoted and appraised. It lists the daily duties and responsibilities of educators under the following four headings: teaching, extra and co-curricular, administrative and interaction with stakeholders.

2.2. SACE (South African Council of Educators) Code of Conduct

This document is intended to regulate the ethical conduct and professional discipline of all educators registered with SACE. The document describes the expected ethical conduct of educators in relation to: the learner, the parent, the community, colleagues, the teaching profession, their employer (the National Department of Education) and SACE.

2.3. Education Labour Relations Council Manual for Developmental Appraisal

The purpose of this document (produced by the Department of Education, Pretoria) is to establish appraisal procedures, criteria and instruments for all levels of educators. It aims to create a nationally unified system of appraisal which will encourage professional development.

The main appraisal instrument is the Prioritisation Form which lists core criteria by which teachers are to be appraised. For example, at post level one,¹⁰ criteria are described under 13 categories: Curriculum development; Creation of a learning environment; Lesson presentation and methodology; Classroom management; Learner assessment; Recording and analysing data; Development of learning field competency; Professional development; Human relations; Leadership; Com-

munity; Extra-curricular; Contribution to school development.

2.4. Committee for Teacher Education Policy (COTEP) Norms and Standards for Teacher Educators

The purpose of this document is to define employers' requirements for the National Department of Education as employer of all educators in public institutions. These requirements are then translated into criteria for the development and evaluation of qualifications for teacher education. Here the document outlines the six roles all educators are expected to play, and describes the 120 competences that teacher education programmes should aim to develop. The six roles are:

- Learning mediator
- Interpreter and designer of learning programmes
- Leader, administrator and manager
- Community, citizenship and pastoral role
- Scholar, researcher and lifelong learner
- Learning area/phase specialist

Each role is defined in terms of foundational, practical and reflexive competences. *Foundational competence* is a demonstrated "understanding of the knowledge and thinking which underpins actions taken". *Practical competence* is "the demonstrated ability, in an authentic context, to consider a range of possibilities for action, make considered decisions... and perform the action chosen". The ability to integrate the above two competences in order to reflect more critically on both is referred to as *Reflexive competence*. This competence develops the ability to "adapt to change and unforeseen circumstances, and explain the reasons behind these adaptations" (Department of Education, 1998: vii, ix).

Analysis of these four policy documents reveals that they work together to create a coherent and consistent regulatory and developmental system for educators. Collectively, the documents firmly uphold the democratic and human rights principles enshrined in the Constitution, while in other matters they provide a fair degree of flexibility and sensitivity to different contexts. By employing the

⁹ See *National Department of Education Duties and Responsibilities of Educators*, Department of Education, Pretoria, South Africa.

¹⁰ The post level at which teachers in non-promotion posts are appointed.

principles of liberal education and outcomes-based education, these principles herald a significant shift from the non-democratic educational practices of *apartheid* to a new democratic system.

Consistent with the new curriculum responsibilities for teachers discussed earlier, the policy documents provide a holistic view of the effective educator as someone who possesses practical, foundational and reflexive competences, and who is able to play a variety of roles. An educator in possession of all three kinds of competence is a self-directed, well-informed and highly-skilled professional with a strong sense of ethics and accountability, who is constantly reflecting on and developing her practice.

Hoyle (1980) provides two useful typologies of professionalism: “restricted” and “extended”. Restricted professionalism refers to teachers whose thinking and practice is narrowly classroom based, rooted in experience rather than in theory, and strictly focused on the academic programme. Extended professionalism refers to teachers who locate their work in a broader educational context, and who systematically evaluate their work because they see teaching as a rational activity amenable to improvement on the basis of research and development. The roles and competences outlined by current South African policy clearly encourage a shift from the “restricted” professionalism required by the past education system towards the “extended” professionalism required by current curriculum policy.

The key question is: do these roles and competences reflect, are they relevant to, and do they resonate with, current classroom realities and practices? In addressing this question we turn first to the empirical mapping of the practices of the ten “effective” teachers onto research schedules based on the six major roles prescribed by policy.

3. Practice: effective teachers in their classrooms

As the six roles in our observation schedule comprise 48 competences, the following analysis of the fieldwork is necessarily generalised.¹¹

3.1. Mediator of learning

All teachers demonstrated a sound knowledge of content and thorough preparation. There was less evidence of the use of formative assessment and teachers’ sensitivity to the needs of individual learners.

3.2. Pastoral role

All teachers were involved to some degree in extra-school programmes such as sports, cultural and artistic activities. Communication with parents to discuss the well-being, conduct and progress of their children was the least prominent role. Counselling is a new role for most teachers and seemingly not easily embraced.

3.3. Administrator

Teachers were very active in record keeping, but not in the planning and co-ordination of integrated and team teaching approaches to learning. Where there was team teaching, it was subject specific rather than cross-curricular.

3.4. Designer of learning programmes

Standard practice was the implementation of provided programmes rather than the designing of original learning programmes. Indeed, teachers felt they had been trained to implement a syllabus and assess learners’ work, not to design and evaluate their own learning programmes.

3.5. Lifelong learner

This role is largely introspective and self-interactive: formal study as an index of lifelong learning can be misleading. Most teachers were involved in personal study. However, research and reflection on practice were not generally apparent;

tram, C., Mattson, E., 1998. The real and the ideal: roles and competences of educators in policy and practice. School of Education, University of Natal: Report produced for the President’s Educational Initiative. A summarised account appears in Taylor and Vinjevoold (1999).

¹¹ A detailed account appears in Harley, K., Barasa, F., Ber-

and some suspicion of teacher appraisal was evident.

3.6. *Community developer and citizen*

Perception of the teacher's role as a community developer was as diverse as it was contested. Three of the ten teachers reported active involvement in union, inter-school collaboration and in establishing links between the school and the community, while others simply did not see the need for these endeavours.

Among the six roles played by teachers, "Mediator of Learning" thus emerged as the strongest category, while "Designer of Learning Programmes" was the weakest. Teachers appeared to be very strong in foundational and practical competences, but much less so in the reflexive competences. These findings are in accord with those of Jessop who found two "dominant frames" in teachers' thinking about job satisfaction: the Instrumental (achievement of good examination results, and the well-known "perks" of teaching, such as holidays) and the Relational (basically, a love of children) (Jessop, 1997: 150). In the overview of her research, she concludes that it "...revealed missing frames of thought between the relational and instrumental, where curriculum development, ownership of teaching and learning, and a language of reflection is absent" (Jessop, 1997: 241).

In broad outline, then, practice embodied "restricted" rather than "extended" professionalism, but the policy/practice interface warrants nuancing beyond these typologies.

4. The policy/practice interface: four emergent themes

Four broad themes emerged from the mapping of practice onto policy.

4.1. *While the effective "teacher-as-educator" is less than the six roles prescribed by policy, the effective "teacher-as-person" is more than the six roles*

None of the teachers scored highly in all of the roles or competences. Reasons were related to tea-

chers' own value systems and to the context in which they worked, two issues discussed presently. However, there is clear evidence that it is quite simply impossible for any one individual teacher to play all six of these expansive roles in a meaningful way. If policy expects "extended" professionalism, there is a danger of "spreading teachers too thin", as one of the teachers pointed out. We find persuasive his argument that while all of the roles were essential, they should be provided collectively by the *school* rather than by each individual teacher.

In practice, then, an effective teacher was not one who played all of the six roles or who demonstrated all of the competences underpinning each of the roles, but one who made an appropriate weighting of the roles and a selection of competences in response to specific contexts. If individual teachers were in this sense something "less than" the prescribed roles, there was a real sense in which (in varying degrees) they demonstrated "something extra" over and above competence in the defined roles. Field notes from the most physically deprived school in the sample—one that had neither piped water nor electricity—provide an example of "something extra" in practice:

The History teacher is very much in control, but courteous ("May I have your attention please?") invites learner participation ("Any opinion on this issue?") gives learners time to think (there are silences) and learners trust him enough to take a few risks ("What did the previous government call black people?" Learner, after a moment's silence, and with a tentative smile: "Kaffirs".¹² Class chuckles quietly with a few sideways looks at the two white fieldworkers in the class. The correct answer is then elicited—Bantu.) Learners are made to feel that they had important contributions to make, e.g. teacher to learner: "Thank you, Precious, for reminding me." Small courtesies, e.g. picking up pen that a learner had dropped. "I suggest that you com-

¹² This is an extremely derogatory and offensive term used in the past by white people to describe black people.

plete this exercise this afternoon.” Learners understood the hidden imperative perfectly.

At an individual level, the teacher had an engaging personality, a vitality, an interest in what he was doing, and an interest in the learners as human beings. He demonstrated an obvious and unembarrassed enjoyment in interacting with learners. Learners listened to him and took him seriously. Like some of the other teachers in the sample, with no indication of authoritarianism or repression, he was in control of proceedings. Learners appeared to accept and trust him, and mutual respect was evident. He had a “presence” that one thought would make his authority difficult if not inappropriate to challenge. In sum, teacher and learners seemed to have shared understandings; participants knew the informal rules and boundaries, and accepted these.

Despite our impression that the “something extra” is a crucial element in the repertoire of roles that constitute effectiveness, we confess that capturing and articulating the concept is frankly not possible at this stage. We suspect, however, that “something extra” is close to what Barber has in mind when he refers to the “unknown universe” of teaching: “...that part of all education that does not obey the laws of physics, that defies logic, but, at the same time, is the key to educational success” (Barber, 1995: 76). More specifically, Barber has in mind

...that crucial part of education that is to do with the classroom interaction of learner and teacher and with the extraordinary ability of teachers to generate sparks of learning, even in the most inauspicious of circumstances. (Barber, 1995: 76)

The farthest we venture into Barber’s “unknown universe” is to suggest that “something extra” is linked to Bernstein’s concept of “achieved”, as opposed to “ascribed”, status. In other words, the teacher is trusted, respected and valued as an individual in her own right. The source of her moral authority is not derived or bestowed simply on the basis of her being a teacher. In more formal Bernsteinian terms, the control relationship is “interpersonal” rather than “positioned” (Bernstein, 1996: 99).

One of the teachers whom we interviewed also provided a clue as to the elusive nature of “something extra” by referring to teachers who are “not called”, implying that these were the teachers whose main preoccupation was simply to be on the payroll.¹³ By contrast, a “called” teacher was one for whom professional commitment and a sense of vocation was intrinsic. A “called” teacher might not necessarily be effective, but it is hard to imagine a truly effective teacher who did not have some sense of calling.

It is significant that the teachers we saw who seemed to possess “something extra” did not necessarily display the roles and competences required by policy. In notable cases, an achieved, interpersonal control relationship was accomplished by means of traditional, teacher-centred practices. So, notwithstanding our inability to define “something extra”, we do not believe that it can be fully disaggregated or apprehended by means of description of discrete roles. Nor can the sincerity of a “calling” be captured by policy criteria, no matter how scrupulous the description of criteria.

This discussion raises the important question of whether or not policy is ever able to neatly “package” the education enterprise by means of technical specifications. In our view, the attempt to do so creates an unattainable ideal, and in so doing fails to capture the “heart” of the profession.

4.2. Teachers’ personal value systems are often at odds with policy

Personal value systems impacted significantly on teacher effectiveness in certain roles. For example, policy requires that teachers promote gender equality, creative and critical thinking, and

¹³ In the literature there is strong evidence that for many teachers, teaching is a second choice, at best (see Jessop, 1997). While the teachers in our sample evinced strong commitment to their profession, some of them indicated that in the case of some of their peers it was a situation that one would suspect anyway—that for many, teaching may have been a choice taken because of inadequate career counselling, the availability of bursary loans to make tertiary study possible, as a route to social mobility, or simply as a secure haven of employment.

that they contribute to community development. Evidence from the field was strongly indicative of a gap between what teachers knew they were obliged to do, and what they actually did. This disjunction was clearly traceable to contextual constraints, cultures and to teachers' personal value systems. There were striking instances of the latter, three of which are discussed below.

4.2.1. *Gender equality*

In the "Pastoral" Role, teachers are to promote gender equality. Teachers' comments reflected some of the practical complexities and contradictions arising from policy expectation:

I try to give equal participation to both boys and girls in answering questions in class. Policy may demand so. But as an individual, I believe gender equality is untenable.

When asked by a researcher whether he personally believed in gender equality, a teacher who was an elected union official and knowledgeable about the rights of learners and teachers, commented:

Never ever! As a man, I believe I am and will always be superior to a woman. Our culture is consistent with this view. For instance, many people ask me why I am not married. I tell them that I will not marry until I get the next degree. I want to marry a woman who is a university graduate. But she must be having lower qualifications than mine. That is why I am working very hard to get my higher degree, then I will marry.

Teachers' personal values interacted with those of their school communities in complex ways:

How do you promote gender equality when the community in which the school is located, and the homes from which learners come, not only practise gender inequality, but insist that the school and therefore the teachers must propagate the same? Do I, as a teacher, do what my employer tells me or what the community where I live and work demands?

4.2.2. *Participation in community development*

In the role of "Community Developer and Citizen", a teacher is expected to understand the values and customs of the community and to help build links between schools and the community in order to promote education and community development. In practice, teachers' perceptions of their role as community developers were as diverse as they were contested, reflecting initiative and indifference, conformity to, and contestation of policy values, as well as optimistic and pessimistic views of policy initiatives towards educational transformation and change. Those teachers not actively promoting community links argued that two factors rendered their participation in community development a complex and remote possibility. First, many schools comprised teacher, pupil and parent communities that were geographically dispersed, and culturally and politically diverse. This meant that community values and needs were too diverse and complex even to identify, never mind understand. Secondly, the view volunteered by three teachers was that while teaching was rightly recognized as a profession, the demands placed on teachers were not matched by remuneration. This, they said, discouraged them from going beyond what was merely obligatory. Apparently, community development is one of the services not considered obligatory by all teachers.

4.2.3. *Creative and critical thinking*

Although teachers were strong in the role of "Mediator of Learning", as we have seen, one of the least observed competences was the development of creative and critical thinking. Such activity can be disruptive of personal definitions of teaching as the transmission of content. For example, teachers who believe that knowledge is objective, ahistorical and uncontested are not only likely to see their role strictly in terms of content transmission, they are also less likely to recognise learners' own experiences as worthwhile resources and to make use of interactive teaching methods such as class discussion and debate, thereby closing off most opportunities for developing critical and creative thinking. In short, teachers' own epistemologies left them rather uneasily at odds with the requirements of both curriculum and teacher roles.

Moreover, irrespective of their personal epistemologies, teachers felt caught between policy values and the values of the community:

The new policy is good but there will be conflict between the government and the Zulu rural community. If children become more critical they will start to question their parents' authority and adopt values that conflict with their community.

Personal value systems also intersect with the privileging of instrumental concerns such as the need to ensure that pupils were successful in their examinations. There is still enormous pressure for students to attain good Grade 12 examination results, as having a Matriculation certificate is seen as the doorway to a secure future and employment. For many teachers, the primary responsibility is to “get their students through exams”, so roles and competences are (consciously or unconsciously) chosen and prioritised towards this end. We encountered teachers who were well aware of what policy required, but who placed more trust in their own beliefs, experience and judgements.

4.3. *The issue of teacher control is underplayed by policy*

With schools and pupils having been in the forefront of the *apartheid* struggle, the heritage of disorder is still pronounced in many schools. In South Africa, as in other countries, “control first” is the most important maxim traditionally drummed into every novice teacher as part of her informal induction into school life. The preamble to the NDOE *Duties and Responsibilities* document, referring to the changing role of the educator, stresses the “shift from control to leadership”. But there is little in policy to suggest what might constitute appropriate forms of control or leadership.

It is widely acknowledged that corporal punishment has been a pervasive feature of life in South African schools. In reporting on “resilient” schools, for example, Christie et al. note that: “In all cases, the resilient schools we visited had consistent disciplinary practices, sometimes peculiar to themselves. ...Some spoke frankly about the use

of corporal punishment...” (Christie et al., 1997: 17). Although outlawed by the 1996 South African Schools Act, corporal punishment was alive and well in many of the schools visited during our research. According to one principal, the community and parents approved of corporal punishment. The School Governing Body of another had voted to maintain the policy of corporal punishment. The surrounding community was traditional and conservative, with parents insisting on strong discipline, a formal dress code, and corporal punishment in the school. Nine of the ten teachers were knowledgeable about the SACE *Code of Conduct* and the South African Schools Act (particularly the outlawing of corporal punishment), but six of them were working in schools that exercised robust disciplinary practices.

What options does policy allow for teachers to establish and maintain control in settings where corporal punishment is entrenched and normative? Only two competences in the *Norms and Standards* allude to classroom management. One is found under the role of “Leader, Administrator and Manager”, and reads: “Constructing a classroom atmosphere which is democratic but disciplined, and which is sensitive to culture, race and gender differences as well as to disabilities” (Department of Education, 1998: 73). The second is found within the “Learning Mediator” role: “Creating a learning environment in which learners develop strong internal discipline ...” (Department of Education, 1998: 69). Neither seems really to take into account the harsh realities of many South African classrooms, where in some secondary schools learners bring weapons to class and can be aged up to 25 years. The problem, as Jansen (1998) points out, is that Curriculum 2005 makes the extraordinary claim that it will transform social relationships in the classroom—learners will take responsibility for their learning, and there will be co-operative relationships. This antiseptic view of the teacher/learner relationship is carried through to policy on teacher roles and conduct, leaving teachers with few officially sanctioned means of asserting and maintaining control.

Because policy imagines the classroom as a place where the teacher is naturally respected and where there is spontaneous co-operation and disci-

pline from learners, it assumes that teachers are free to explore the new roles and competences required by the new curriculum. But research shows that for many teachers, the need to keep discipline is the most important factor in choosing roles (if they are consciously chosen at all). In his research in British schools, Woods (1990) attributes various teacher strategies to the crucial need simply to establish and maintain control. Woods calls these “survival strategies”, which links with McNeil’s (McNeil, 1983) point that teachers use these strategies simply to get through the day, and not because of their personal or political values (which often conflict with the strategies they use). One pre-emptive teacher strategy to maintain control is teacher talk: “The teacher’s first strategy is to impose her definition of the situation by talking most of the time. So teachers talk. And not only do they talk—they talk a great deal” (Delamont, 1976: 94). In our fieldwork we heard hours and hours of teacher talk. Although some of this was effective and perhaps even contextually appropriate, it was clearly in direct contradiction to the ideal of policy: that classrooms should be places full of creative activity and critical learner discussion.

In our view, by fudging the issue of control and euphemising classroom relations, policy sets up an ideal that in the perspectives of many teachers is unattainable, and it fails to work creatively within the real constraints of teacher practice.

4.4. The school context influences the allocation and definition of roles

Fieldwork demonstrated the profound influence of school context on the way in which different teacher roles and competences were made sense of, prioritised and practised. Two points merit development here: firstly, the influence of school context on role allocation and role selection; and secondly, the influence of school culture on the social definition of teachers’ roles.

4.4.1. Role allocation or role selection

In a very real way, circumstances circumscribe the possibility of teachers fulfilling particular roles. For example, in the under-resourced schools, tea-

chers were thrown entirely on their own resources. Lack of physical provision made it impossible for them to exercise certain roles, and made them very reliant on others. The effect of constraints imposed by lack of resources is more easily appreciated as a result of personal experience than through description. We encountered the physical starkness of some classrooms: no electricity, very few books, some stationery; really just a bare concrete floor, four dingy walls, a chalkboard, chairs, desks, and a teacher. Teachers can be effective in these settings, and our fieldwork bore testimony to this, but the context unquestionably made them heavily reliant on teacher talk or verbal interchange with learners. In some physical contexts, then, certain roles were virtually “given” to teachers, while others were effectively denied.

Roles were also distributed across the staff of a school in terms of its own division of labour. The division of labour was much more complex in better-resourced schools. In these schools, certain designated roles were the responsibility of specialists. In the better-resourced schools, academic records were fed into a computer by a specialist administrator; and other administrative roles such as fee collection, control of stock, and photocopying were managed by specialist administrators in terms of rules and contract. These schools also had specialist counsellors who took primary responsibility for the pastoral care of the learners.

4.4.2. The social definition of roles

Certain schools provided a context more amenable than others to teachers carrying out their particular roles effectively. Roles that were appropriate and expected were clearly if implicitly defined in the culture or ethos of these schools. In such schools there was a common definition of the situation, a shared framework of assumptions about the purpose of the school, a value consensus. The most powerful form of consensus included learner acceptance of certain boundaries within an established framework, even where this was not formally defined. Teachers in a school with shared understandings were in a strong position to be effective and to exercise appropriate roles where there was social agreement about respective roles within the school.

The best illustration of school consensus was presented at a morning assembly held in the grounds of what was the most resource-deprived school in our sample. The great majority of learners arrived on time and quietly arranged themselves in orderly rows. A few latecomers quickly took their places. The staff stood behind the principal who addressed the assembly in a relaxed, conversational and engaging manner. When he had finished, and began walking away, the assembly began singing in unison. What was striking about this scene was the absence of overt control—no controlling staff, no “prefects”, no accompaniment or direction for the singing, and none of the instruments of control like sirens or megaphones. To those accustomed to a standard pattern of overtly-controlled patterns of learner speech and movement, this event posed a question: Where was the puppeteer who was pulling the invisible strings?¹⁴

We conclude that consensus about the purpose of the school was in fact the unseen hand. There was further evidence of this in the movement of learners and in the classes we attended. One of the teachers was asked why learners did not appear to have to be disciplined in an overt way, and about the fact that the school seemed to function on shared understandings:

Fieldworker: “What makes this school work?”

Teacher: “It just does. It’s the culture.”

The key element in this “culture” is a common definition of roles. This definition embraces beliefs about the fundamental elements of school life such as a view of knowledge, the idea of what a teacher is, what teaching is, what it means to be a learner, the nature of appropriate authority relationships, and so on. The inter-relationship between the indi-

vidual teacher and school culture was illustrated in a significant way by the contrast afforded by one particular school which, unlike the others, did not present a consensual school culture. Of the six schools, this one had the weakest sense of purpose (as well as a declining pass rate, a problem of learner lateness, and an apparent lack of team spirit). There was little observed or reported broader community interaction, and corporal punishment was more overt: “uses the stick to thrash students on the hand at the gate when students are late” (Fieldworker’s notes). Despite these measures, there was a lot of noise in the school, and absenteeism seemed to be rife. In contrast with the openness of teachers experienced by the research team elsewhere, teachers in this school felt threatened and defensive about the research project.¹⁵

Although the six schools were very different, there was evidence of a correspondence between the culture of the school and the work of the teacher. One interesting example was the seeming relationship between school orderedness and the way in which the effectiveness of a teacher was defined. At one school which was not very ordered, the good teacher was one “who teaches in spite of the shortages of books and resources” (Fieldworker’s notes). At another, *all* teachers knew they were there to teach—this was part of their common definition of the situation embedded in the culture of the school. It seems then that effective teaching despite the odds can be seen either as a norm (in ordered schools), or a sign of exceptionality (in the less ordered schools). In her study of rural primary teachers in KZN, Jessop (1997) provides some support for this hypothesis. She found low morale and collapse to be linked with extremely narrow definitions of professionalism. In such settings, professionalism was associated with “being sober, present and punctual” (Jessop, 1997: 199–200).

Are higher levels of expectation translated into higher levels of performance? This would be a question for further research to address. However, it was notable that in the “Mediator of Learning”

¹⁴ This image is borrowed from Berger (1963). It is important here to stress that although the example of this school may be unusually striking, it does not appear to be an idiosyncratic school. One of the other schools was described as “a busy school with a well-defined sense of purpose”. Another was described as a school characterised by respect, friendliness and trust. Authority structures were easily accepted, and there was a sense of school community (within a broader community), a sense of comfort with roles and relationships.

¹⁵ One of them also expected monetary compensation in return for participating in the research.

role, for the teachers in the school where “effective teachers teach despite shortages”, *teach* is exactly what they did. They lectured relentlessly, with little contact, and with little feedback to the learner. It was notable that the task-directed focus on the “instrumental order”¹⁶ (and the teacher’s subject knowledge was excellent) was accompanied by corresponding neglect of the “expressive order”.¹⁷ Counselling and pastoral care did not appear to be areas of concern or priority. By contrast, at a third school, one which projected a strong sense of cohesion and community, the roles of “Mediator of Learning” and “Pastoral Care” were accorded priority. Effective teaching was believed to occur when the teacher knew the subject well *and* did “some spiritual work” with the learners, and “imparted morals” (in the words of one teacher).

The import of this discussion is to suggest that teacher roles are not prescribed by policy alone: they are also socially defined, and strongly influenced by the resources and culture of the school. Across all levels of financial resources, in schools where there was a common culture and a shared sense of purpose among learners and teachers, the teachers’ roles were more clearly defined, and tended to reflect a more extended view of professionalism.

5. Implications of policy/practice disjunctions

We have noted the internal consistency and coherence of the four policy documents on teacher roles and competences. Policy is progressive, transformatory and consistent with broader national policy. However, we also noted that while policy assumes that the enterprise of teaching can be neatly packaged and efficiently managed in the implementation of official goals, practice showed how irreducible it was to such programmatic planning and management. As we have seen, the roles that teachers played, and the competences they demonstrated, had little to do with any notion of

“norms and standards” or the conscious, rational decision-making implied by such a term. The ten teachers in our sample of six schools (sometimes consciously and often unconsciously) assumed roles that were more in accord with personal value systems, local cultures, and contexts. Overall, they fell short of the “extended professionalism” expected by policy; and, more significantly, did so in ways that created a number of fundamental disjunctions with policy expectation.

The extent to which generalisation might be possible on the basis of the size of our sample is a matter for debate. Whilst acknowledging limitations of the sample, we nevertheless argue that the very nature of the sample invests it with significance. The sample was drawn from a historically and geographically representative range of schools, and was comprised of schools and teachers selected on the basis of their “resilience” and “effectiveness”.¹⁸ Policy/practice disjunction in such a select group of teachers strongly suggests that disjunctions will be widespread. This argument provides a basis for brief discussion on the implications of policy/practice disjunction.

In the introduction to this paper, we cited examples of education policy initiatives in developing countries which had not taken into account the context and the agents of transformation. In particular, we raised the concern of Broadfoot et al. (1988) that policy which is out of touch with national traditions and classroom realities might result in lowered morale and decreased effectiveness, and Enslin and Pendlebury’s (Enslin and Pendlebury, 1998) concern that this might ultimately impede transformation. Are these concerns justified in the case of South African policy on teacher roles and competences? We believe they are. The essence of the difficulty is captured in Sarason’s conclusion that:

Educational reformers have trouble in understanding that change by legislative fiat or policy pronouncements from on high is only the first

¹⁶ “the transmission of specialised skills” (Bernstein, 1996: 97).

¹⁷ “the transmission of conduct, character and manner” (Bernstein, 1996: 97).

¹⁸ The selection of schools was made at a meeting that included more than 20 Senior Education Managers representing the regional educational authority.

and easiest step in the change process...they confuse a change in policy with a change in practice. And they also assume that change is achieved through learning or applying good ideas. They seem unable to understand what is involved in unlearning and what custom, tradition, and even research have told educational personnel what is right, natural and proper. (Sarason, 1991: 101)

South African policy designers have rightly capitalised upon the country's desire for educational change, but what they have not taken into account is that, whether it is voluntary or imposed, all significant change entails the "unlearning" of what has long been held as right, and this brings with it a sense of loss, anxiety and struggle. Unless this emotional aspect of change is addressed, trouble with the change process is inevitable. In this sense, the absence of policy implementation plans reflects oversight of a powerful body of literature that is best encapsulated in the Fullan and Hargreaves argument that if teacher development is to be successful, it needs to incorporate the teacher's purpose, the teacher as a person, the real world context in which teachers work, and the culture of teaching in that context (Fullan and Hargreaves, 1992: 5).

Similarly, Goodson (1992) maintains that professional development involves shifting from seeing teachers as educators, to seeing them as people. That is, seeing teachers not just in terms of roles, but as people with human needs and aspirations.

For real change then, what teachers need is not impersonal policy directives implemented from above with the overtones of authority and control, but localised, contextualised, even personalised, developmental support and assistance in the everyday business of teaching. And what this requires is policy that is sensitive to contextual diversity being implemented at local community level by those most in touch with local conditions. Delivery and implementation plans therefore depend crucially on strong links between national and provincial departments and schools, and clearly defined levels of responsibility and autonomy within and between these institutions. However, the replacement of racially defined departments with provincial departments of education has created "complex

relationships and poorly defined responsibilities" (SAIDE, 1998: 2). The intention was for policy designed at national level to be implemented with greater autonomy at provincial level, but:

The new reality is that agreements reached on policy and implementation issues at national level generate responsibilities for provincial departments of education which they are often unable to carry out, because of lack of managerial capacity, or simply because their budgets (designed and legally approved before the new mandate is received) are too small. As a result, the relationship between the national and provincial departments is evolving in two contradictory directions which need to be monitored: while there are moves to increase the autonomy of provincial departments, the decision-making and negotiation processes which might resolve the current tensions have yet to be designed. (SAIDE, 1998: 2)

The result of this confusion is poor communication, leaving schools and teachers unaware of policy developments. "...(T)alking to teachers in rural areas reveals just how little of national policy filters down to schools, and how oblivious teachers are to broader developments" (Jessop, 1997: 9).

With regard to curriculum and school governance policy, the state has thus far placed heavy reliance on professionally-produced booklets, stickers and posters. But an extensive tracer study has found that on average, only 19% of material leaving the national department actually found its way into the hands of staff and governing bodies (Palmer Development Group, 1999).¹⁹ Policy governing teacher roles presents even greater difficulties as it is presently available only in four separate documents. Teachers are left with the task of collation and little hope of developing an in-depth, unified view of policy and its implications.

We have commended policy for showing suf-

¹⁹ The Palmer study also confirms the finding in the present study that teachers lack the disposition of lifelong learners. Teachers, admitting that they did not like to read, suggested that lesson plans and demonstration lessons on video would be more useful than booklets.

ficient sensitivity to the diversity of contexts in which it will be applied, and this sensitivity and flexibility can be seen particularly in the *Manual for Developmental Appraisal*, the document which will impact most directly on schools and teachers.²⁰ However, the discretionary powers allowed on paper will not necessarily apply in practice because they depend on two things: the reflexive competence required of teachers to evaluate and respond to contextual needs; and responsible and supportive education authorities who will ensure that the developmental function of the policies is carried out. We have seen that both of these are lacking. In their absence, we will surely be left with ritualistic compliance to policy regulations which have been imposed verbatim and not negotiated or internalised in any way. Some suspicion of the appraisal process was also evident at the schools in our sample. One teacher predicted:

People will concentrate on the paperwork as proof that they are doing well. But what is happening in their classrooms? How do we determine teachers' performance in the teaching and learning situation? And this process will be time-consuming. It will take teachers away from the classroom. People will use it to get ahead and it will cause conflict between the principal and the teachers because how will we avoid bias?

If policy is implemented in a rigid, bureaucratic way and neglects the teacher-as-person, and if teachers feel compelled to meet technical criteria in order to keep their jobs in an atmosphere of low morale and job uncertainty,²¹ then the problems

²⁰ The *Manual for Developmental Appraisal* is flexible in that it allows teachers to select and prioritise core, optional and additional criteria for each cycle of developmental appraisal. It further acknowledges local differences by recommending that appraisal panels be made up of education stakeholders drawn from the community served by the school.

²¹ The emotional dimensions of change that teachers are likely to experience are further compounded by the fact that the morale of the teaching profession has been undermined by a succession of uncertain, controversial and contested moves to redistribute personnel across schools in a more equitable way. Internationally, "teachers' salaries consume between 75 and 95 percent of the education budget" (Watson et al., 1997: xix). In

anticipated by this teacher seem quite likely to eventuate.

Finally, it is necessary to consider the implications of what is at stake in terms of educational transformation. Jansen argues that "it is important to understand OBE [Curriculum 2005] as an act of political symbolism in which the primary preoccupation of the state is with its own legitimacy" (Jansen, 1998: 330). A more charitable view would see the state falling into the same trap as the American social reconstructionists of the 1920s and 1930s, who saw schooling and curriculum reform as the pre-eminent route to the resolution of social problems and the creation of an ideal society. Social reconstructionism, one of the major reform impulses in our century, was rooted in social meliorism (Kliebard, 1986).

A vision can so easily slide into meliorism and unfortunately, the consequences of such a meliorist perspective have long beset our field; too often and for too much of our history we have not been able, because of our commitment to what should be, to look at what is. To look at what is betrays, our emphases suggest, too little passion, even perhaps a conservative willingness to accept schools as they are. (Westbury, 1973, cited in Goodson, 1991: 153)

If policy is to move beyond political symbolism and social meliorism, it must look squarely at "what is". And schools and teachers "as they are" make it manifestly clear that policy on teacher roles and curriculum—in fact the entire edifice designed to transform South African education—will stand or fall on the basis of the support offered to teachers in the implementation of the policy, as well as the extent to which the support deals with teacher beliefs and assumptions, and not only the outward signs of changed practice.

Changes in teacher practice may be significant, but they are superficial if profound changes do not occur at the level of teachers' beliefs. Profound

KwaZulu-Natal, where the figure is 93% (EduSource, 1998) there have been strenuous attempts to "rationalise" the teaching body by dismissing temporary teachers.

changes involving redefinition of teaching, and of the teacher as a person, are more likely to be sustained because these are personal. Our research suggests that if teachers are not well supported in implementing policy governing their roles, the consequences will be more severe than just a surface change. Without developing this argument fully, we make two main points. Firstly, despite the modification of imported policy initiatives to suit the South African context, important conditions that endanger the successful implementation of policy have not been taken into account. In our view, the risk of resistance to change leading to tissue rejection²² seems so great that policy might ultimately disempower teachers. We fear that intended empowerment becomes unintended disempowerment, with “status panic” (Mills, 1959) exacerbated by job uncertainty.

Secondly, the major casualty of unsupported policy would be equity and social justice. We have noted that policy on curriculum and teacher roles reflects the influence of globalisation with an emphasis on liberal values, interdisciplinarity, flexible multi-skilling, and information technology. In fact the values and practices inherent in policy correspond with the image of a particular kind of school with particular cultural and material resources. We think this image corresponds more closely with historically advantaged than with historically disadvantaged schools, and that policy might compound an unequalising tendency already noted in South African education. Teachers in rural areas, being the most disadvantaged and least qualified, are most likely to engage in “survival teaching” (Hartshorne, 1992). They are also most likely to feel unrepresented and unsupported by policy and, given their relative isolation and the uncertain relations and poor communication between new national, regional and local education officials, are least likely to experience policy as an opportunity for personal and professional development, and most likely to experience it as intimidating paperwork.

²² Hoyle’s (Hoyle, 1970) medical metaphor based on the host’s immunological system rejecting the transplanted organ. See also Tabulawa (1997).

6. Conclusion

Policy describes the ideal teacher with clarity and precision, but does not see the real teacher and the cultural and material constraints imposed by classroom reality clearly enough to understand what must be involved in achieving this ideal.

In the first 5 years of its existence, the national education ministry in the new democratic state has seemingly been content to construct policy and to define norms and standards, leaving provinces to implement policy. Even allowing for the limited nature of the empirical research reported in this article, it is very difficult to see policy ideals being realised unless the state adopts a far more interventionist, “hands on” approach to the co-ordination of appropriate forms of flexible and context-sensitive teacher development. In this regard, an encouraging development has been the President’s Education Initiative. In 1998, the national Department of Education commissioned a programme of empirical research into teaching and learning in South African schools. The purpose was to provide a basis for “the future planning and delivery of educator development and support programmes” (Taylor and Vinjevold, 1999: iii). Findings were presented to the national Department of Education at a conference held in May, 1999 (see Taylor and Vinjevold, 1999). In the context of a broader picture that is not encouraging to visions of transformation, this type of initiative provides the potential for the synergy necessary to marry the “real” with the “ideal”.

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