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1. The Teacher Development Summit - By Bernice Davids

1.1 ADDRESSING TEACHER DEVELOPMENT IN SOUTH AFRICA

The quality of education in South Africa has been an issue of much debate. National consensus in the media has been that South African education is not on par with international standards, even lacking behind some less developed African countries. The Department of Education (DoE) acknowledges that education is a national issue that requires intervention not only from government structures, but from all South African citizens, as restructuring our education system is a collaborative effort that requires input from all South Africans.

The overall quality of education is determined by the quality of professional training offered to teachers. Significant strides in education can be made, when the quality of teacher training and development is addressed.

A meeting on 03 September 2008 between education stakeholders and the Minister of Education, Ms Naledi Pandor, sparked the need for a summit to address teacher development and training. All parties agreed that there was a dire need for teacher training and development as current strategies do not clearly outline the roles and responsibilities of educators.

The Minister requested the DoE and teacher unions to develop a concept paper on teacher development in South Africa. The concept paper will include an examination of the pertinent legislation, policies and other relevant documentation, initiatives and processes as well as their efficacy, and make recommendations for developing coherence for teacher development within the system. The concept paper will also provide a common vision for teacher development.

The national Teacher Development Summit (TDS) taking place from 30 June to 03 July 2009, seeks to clarify and debate the current teacher development landscape in South Africa in terms of existing policies and proposals. The overall aim of the Summit is to facilitate systems wide teacher development that will ultimately lead to sustainable improvement in the quality of teaching and learning in South African schools.

It is imperative to look at current teacher development programmes and determine their level of success and see how they can be improved upon to adequately address teacher development needs.

1.1.1 Background

The uneven landscape in terms of teacher development in South Africa was primarily created by the Bantu education system that did not make quality education accessible to black South Africans. James Keevy (2006) wrote that while most white teachers received pre- and in-service training at well resourced urban universities, most black teachers started teaching without even completing their own secondary schooling, much less the tertiary education that they needed.

According to Keevy (2006), increased pressure from the international community for transformation, forced the South African education and training system to undergo significant changes in the early 1990s. These developments set in motion significant systematic transformations that were formalised with the advent of the new political dispensation in 1994, when the African National Congress (ANC) government decided that a number of large scale transformations and interventions would be necessary to systematically redress the inequalities that apartheid had conceived.

In March 2001, *Edusource Data News* publication, "The Education Foundation", reported that there were some 85 000 teachers in South African classrooms with fewer than 3 years of professional training.

These conditions posed a threat to the quality of teacher development in the country, and medium-term national programmes such as the National Professional Diploma in Education (NPDE) were developed to address this problem. The NPDE promised to allow teachers with inadequate training accelerated access to further and higher education and training.

Another significant policy was the establishment of the National Qualifications Framework (NQF). The NQF has created the opportunity for new qualifications such as the NPDE to be developed, with full stakeholder consultation, over a relatively short period in order to address immediate needs. Such qualifications are nationally recognised and

can be offered by any accredited provider. Before the NQF this would have been very difficult to do.

Keevy (2006) affirmed that the composition of professional qualifications on the NQF is currently being debated. A call for "PD points" to complement NQF credits is but one example of the various elements that may contribute to a professional status. There is no doubt that teacher development in South Africa has been influenced significantly by the development and implementation of the NQF. Although this influence has been largely positive, there are still areas that remain unresolved. Increased regulation has benefited teacher education by leading to a redesign of courses, improved access, improved quality of learning and teaching, and improved assessment practices.

The South African NQF is still in its infancy, yet much has been achieved in a very short space of time, while teacher education has gradually developed over the centuries. The area with the most significant issues to redress is undoubtedly quality assurance practices.

Glenda Kruss (2009) also wrote on the improvement of higher education for teachers and stated that since 2004, sustained attention has been given to the improvement of teacher education consequent on the revision of the curriculum and the restructuring of higher education. In October 2004, the Council on Higher Education (CHE) initiated a review of teacher education programmes. On 26 April 2007, a National Policy Framework for Teacher Development was gazetted. This provided the basis for a new system of teacher education and development for a new generation of South African teachers.

The structures in place for teacher development have however achieved minimal results. Kruss (2009) affirmed that while the systems in place for teacher development have not yielded the desired results, it is evident that the most pressing requirement is not more change and new structures, but consolidation of an emerging system.

1.1.2 Current interventions

The DoE has proven its commitment to the ongoing process that will ensure that South Africa has the amount of quality educators that it

requires. In 2003 the Minister of Education set up a Ministerial Committee on Teacher Education to develop a National Framework for teacher education (DoE, 2005). The Committee aimed to develop “clarity and coherence across the various authorities and policies that play a part in the education of professionally committed and competent teachers.” (DoE, 2005:2)

The Committee was also guided by the following broad principles:

The right to quality education for all is a right without limitations in South Africa
Teachers are the key agents in the quality of the education system

The Minister said in April 2008 that the education department allocated R180 million in 2008 for service-linked bursaries for 5 000 student teachers in universities, aiming to train more primary school teachers, more teachers to work in rural schools and more maths and language teachers – the areas of critical shortage. (Karen MacGregor, 2008)

Although the DoE has taken ownership of the drive to restructure and consolidate initiatives to address teacher development, other stakeholders in education have also contributed to this process. The South African Council for Educators (SACE) in collaboration with the DoE introduced the Continuing Professional Teacher Development (CPTD) management system where professional development points will be allocated to educators if they participate in and/or enrol for certain endorsed activities, such as teacher priority activities; school priority activities, or profession/system priority activities. This is a programme that encourages continuous development of teachers.

The Education Labour Relations Council (ELRC) facilitated meetings with the DoE and the combined teacher unions in the ELRC, CTU-SADTU and CTU-SAOU, which resulted in collective agreements such as the establishment of Performance Management Contracts for educators. An integral part of this contract is the inclusion of a Personal Growth Plan which requires that the relevant EMS members must also enrol and/or attend development courses.

Another prominent agreement that was reached was the Recognition of Prior Learning (RPL). Approximately 144,000 educators have

qualifications that do not meet the REQV 14 requirements. Such educators have until 2013 to upgrade their present qualifications in conjunction with their proven relevant experience to REQV 14.

Parties to Council also agreed to 80 hours of professional development for teachers per annum. Provincial departments of education are entitled to provide compulsory professional development opportunities outside the formal school day or during school holidays to educators, provided that such opportunities does not exceed 80 hours per annum. Provincial departments also require educators to regularly attend various workshops, seminars, etc.

1.1.3 Finding solutions

Significant policies were established since the democratic government was voted into power in 1994, to address the training and development needs of teachers in South Africa. As well intended as they are, these policies and programmes have not achieved the required standard of training and development for teachers. The Teacher Development Summit offers a national platform for the debate and discussion of issues that hinders the attainment of a consolidated structure for teacher development.

1.2 PERFECTING THE ART OF TEACHING

The selected slogan for the Summit, “Perfecting the art of teaching”, encapsulates the essence of the Teacher Development Summit, which seeks to restore the image of the teaching profession. This is an ongoing process that started with the round-table deliberations. It highlighted the challenges that all stakeholders in education need to curb in order to arrive at a place where the imbalances of the past are addressed and the teaching profession is restored to what it should be, a calling that allows educators to be part of one of the most dynamic and rewarding processes: to mould the intellectual capacity of a nation.

1.3 ROUND-TABLE DELIBERATIONS

To ensure the success of the Summit, a round-table discussion was planned to allow stakeholders in the education fraternity to

deliberate on the key objectives of the Summit and to develop a common framework for the inputs to be made at the Summit.



TD Roundtable – 7 April 2009 (Eskom Convention Centre)

The round-table discussion on 07 April 2009 allowed education stakeholders to have a frank discussion about what needs to be done to improve teacher development policies and initiatives.



Acting DG – Mr Firoz Patel (DoE)

The Acting Director-General of the Department of Education, Mr Firoz Patel, said that the round-table and the Summit were not intended to be a bargaining forum, but a “listening forum”. This sentiment characterised the proceedings of the round-table discussion, as it opened up frank debate about what has not been achieved in terms of teacher development and more importantly touched on the concerns that educators have with regard to existing policies.

The discussion panel consisted of representatives from the combined teacher unions, CTU-SADTU and CTU-SAOU; the ETDG-SETA; the DoE; SACE and the Dean’s Forum with Prof Mary Meltcalf and Prof Michael Samuel, who brought an academic perspective to the discussion.

Mr Thulas Nxesi, on behalf of CTU-SADTU, noted that SADTU had been calling for a teacher development Summit since 1994. It was regarded as very important in terms of South Africa’s history of discriminatory education delivery. Underqualified educators with a lack of essential content knowledge remain a challenge. Curriculum change had generated further training needs.



Mr Thulas Nxesi (CTU-SADTU)

He compared the teacher development landscape with a jigsaw puzzle that its pieces are mixed up and whose box-top picture is lost. Although structures, institutions and policies have been developed, it is not clear how all these fit together. There is duplication, with effort being made in silos where work is not coordinated across the field. The result is extra workload for teachers, but no benefits. There is the hope that the new National Education Evaluation and Development Unit (NEEDU) will not simply add another layer of bureaucracy.



Mr Dave Balt (CTU-SAOU)

Mr Dave Balt, on behalf of CTU-SAOU pointed out that classroom experiences are characterised by limited resources, with administrative demands detracting from teaching activities. District office support was also hampered by skills limitations.

Mr Rej Brijraj (CEO-SACE) reported that from the South African Council for Educators (SACE) perspective, there has been much debate and some consensus reached over the past seven years, although there are some significant challenges.

He said that teacher development is underpinned by four principles:

- contribution to professionalism;
- quality teaching for quality learning;
- ensuring improvement of schooling; and
- continued development for teachers as agents for change.

Mr Brijraj gave an outline of the processes leading to teacher development policy. A wide range of consultations had taken place taking cognisance of the Norms and Standards for Educators, and recognising the occupational, academic and professional aspects of teacher development. This culminated in the National Policy Framework on Teacher Education and Development (2007).

Since then a plan has been produced for the points system according to which teachers choose professional development programmes from teacher-driven, school-driven or profession-driven categories. SACE will be endorsing all programmes and activities, and awarding points according to importance and relevance to both accredited and unaccredited programmes in a holistic view of training.

Discussions will be held with the Minister to ensure funding, and even implementation on the part of Teacher Development Units in the provinces. The CPTD system will be piloted in 142 schools in nine provinces between 2009 and 2010, with roll-out in 2011.

Mrs Nombulelo Nxesi (CEO-ETDP SETA) reported that the ETDP SETA was committed to teacher development. The SETA ensures a skills blend and quality providers, both public and private. However the issues are broader, covering teacher supply, utilisation and retention as well as development, and also teacher wellness. Given that research projected a shortfall of 15,000 teachers by the end of 2008, partly because of the effects of the HIV/AIDS pandemic, there is a need for 75–90,000 new teachers over the years 2009 to 2015.



Mrs Nombulelo Nxesi (ETDP-SETA)

She said that while accreditation of CPTD programmes ensures quality, quality assurance of unaccredited programmes is problematic. Programmes tend to focus on policy advocacy rather than skills, and are often too short to be effective.

The adequacy of capacity and skills for support and development among provincial subject advisory services must also to be questioned.

Mrs Nxesi stated that the Summit must consider what is the required qualification for educators and how speedily systems can bring teachers up to that qualification level. The minimum qualification level is REQV 14. Teachers cannot be labelled underqualified if the minimum qualification level has changed.

She noted that the incorporation of teachers' voices is a critical element of the process, characterised in the slogan 'nothing for us without us'.

Prof Mary Metcalfe of Wits commented that this is a historic meeting, raising issues that have needed to be raised for a long time. She said that the Summit must mark a decisive shift from the past, but retain the elements of teacher development that are working.

Prof Metcalf summarised the consensus principles reached at the round-table meeting:

The focus of what we do must be improved teaching and learning

Teacher development must be credible to teachers, responsive to classroom needs and workload, differentiated and meet a range of individual and systemic needs in different contexts (e.g. rurality, language, phase)

Policy must be deeply respectful of teachers, not treat them as unimportant but as intelligent, sophisticated, elegant thinkers and committed professionals, approaching teachers with the belief that they are people we value and respect.



Prof Mary Metcalf (Left) and Prof Michael Samuels (Right) – Deans Forum

Prof Michael Samuels of the University of KwaZulu-Natal observed that words that have been repeated have been *coordination* (eg IQMS, CPTD), *integration*, *streamlining*, *consolidation*, and *alignment*. Systems need to be talking to each other to provide models for use: a resourcing model, a management model and a theoretical framework.

Prof Samuels expressed concern at the lack of knowledge of what systems and policies provide.

For example, the SACE plan is not understood in wider public.

He said there is a need for a context-based education system, not 'one size fits all', and an identity-based response, taking account teachers' backgrounds and contexts.

Audience engagement at the round-table deliberations highlighted the views and concerns of educators and teacher union members, as well as the views of provincial education departments.

Some of the concerns raised were:

The balance between development and evaluation – these are two sides of the same coin. Evaluation identifies strengths and weaknesses and is followed by developmental programmes, but none of the existing initiatives (DAS, WSE, IQMS, NEEDU) have done this, instead evaluation has been linked with salaries. There are roles to be played by unions and by employers. There is a contradiction in using the same evaluation tool for the purpose of development and for salary purposes.

'Teachers do not understand the curriculum, neither do trainers and parents.'

Universities do not have adequate capacity because of over-emphasis on IPET bursaries, so there are inadequate resources left for CPTD.

Supply of properly qualified teachers is a problem particularly in the rural areas where the time taken to fill posts is problematic. In some cases learners leaving school with Grade 12 are taken on as teachers of Life Orientation. These 'desk jumpers' are also candidates for teacher development and qualification upgrading.

Rural areas are further neglected as a result of a lack of teacher centres.

Part of teacher development focuses on qualifications, and part has been directed at the new OBE methodologies. Professional development needs to target teachers' classroom practice and ultimately to influence classroom results. There is a need to intertwine and coordinate processes.

How can we change the mindset of teachers? Instead of training, professional development is needed. Every teacher must take responsibility for their professional development, which leads to corresponding obligations on the part of the

employer. The context in which teachers are working must be considered. Teachers' voices must be listened to if professionalism is to return. Teachers are being deskilled, over-regulated and over-managed.

Language is an important consideration for teacher development. Learners graduating from Grade 12 are not competent in English. Teachers need to be able to help learners to use language. Language needs to become an effective tool for teaching and learning.

Teacher development discussions need to take into account multi-grade teaching.

1.4 THE ENGAGEMENT PROCESS

Mr Mahalingum Govender (General Secretary-ELRC) introduced the media engagement process at the round-table deliberations. Mr Govender indicated that public engagement is a critical part of the process as it will ensure that the decisions made at the Summit with regard to teacher training and development, is inclusive of the most important voices in the entire process: the voices of South African teachers. The www.tdsummit.co.za website was officially launched at the roundtable and would serve as a platform that will allow teachers to actively participate in the deliberation process leading to the Summit.

In addition to being a general communication tool, the website is vital in the engagement phases as it is the primary means of collating views of the educators and general public, and distilling and analysing the response. The website had been developed to cater for a database and analysis capability for qualitative analysis and submissions, and is linked to all stakeholder websites.

Mr Govender mentioned the significant role of trade unions in propagating the Summit through their newsletters. There will be a process of continual stakeholder engagement which should be completed in advance of the Summit.

Editorials and advertorials will be placed in all relevant stakeholder media, including websites, e-newsletters etc, as well as other low/no cost media directed at teachers. Mainstream/general public newspapers will not be approached due to the immense costs involved and the fact that the

target audience makes up a small portion of the general readers.

Examples of targeted media:

- ELRC – New Negotiator’s News
- Mail & Guardian – The Teacher
- SADTU – E-Voice
- SAOU – Blitz News etc.

The media strategy and rollout covers the following identifiable phases:

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|----------------|--|---------------------------------------|
| Phase 1 | Pre-Roundtable | 7 April 2009 |
| Phase 2 | Roundtable | 7 April 2009 |
| Phase 3 | Engagement (teachers/experts/stakeholders etc) | 8 April – 27 June 2009 |
| Phase 4 | a. Pre – Summit b. Summit | 30 June 2009 30 June – 2 July 2009 |
| Phase 5 | Post Summit | 2 July 2009 |

The debate on teacher education and teacher shortage has various views and opinions in the media. The TDS media and communication strategy is thus focused and has taken on an interventionist approach to communicate the views of all stakeholders.

The target audience that the TDS aim to capture includes:

- Teachers;
- Education experts;
- Education Trade Union Leaders;
- Deans of Education;
- Government officials involved in education;
- and
- Other interested stakeholders.

Marketing material at the Summit will include banners for branding purposes and information/programme brochures containing information on the event programme, speaker profiles and abstracts, and delegate and stakeholder contact details.

Pamphlets and/or posters are being printed and distributed in order to promote the event. All marketing material will be sent to the various Provincial Departments (district offices) from where it will be distributed to the various schools.

Two videos will be produced for the Summit. The first video, which focuses on the round-table discussion, has already been produced and will be distributed to TV stations to be aired or used in talk show programmes, etc. The second video will be a Summit Report.

A Post-Summit Report will be compiled and printed.

1.5 TEACHER DEVELOPMENT SUMMIT (30 JUNE – 02 JULY 2009)

The round-table deliberations paved the way for the Teacher Development Summit. Two processes will inform the Summit deliberations:

Engagement with stakeholders; and
Commissioned papers that will form the basis for a Summit concept paper.

The conceptual framework will guide the two processes to ensure sound preparation for the Summit. Nine themes were identified and each theme represents a possible discussion paper. The themes are:

Relevance of teacher development to the roles and responsibilities of teachers
Continuing, coherent, lifelong learning
Qualifications and competence
Priorities and choices
Obligations, expectations and resources
The roles of teacher development actors
Management and articulation of teacher development/IPET
The teacher development landscape; and
Advocacy

A range of academics and education practitioners will write a position paper on each of the themes. This process does not require new research, but will draw on available work and be informed by evidence.

The deliberation process has begun and the commitment of all stakeholders displayed at the round-table deliberations, indicate that the TDS will mark an important chapter in the history of our country and will bring about the changes that are required to redeem the status of the teaching profession.

Bernice Davids

2. THE QUALITY LEARNING AND TEACHING CAMPAIGN (QLTC) - By Bernice Davids



2.1 LAUNCH OF THE CAMPAIGN

The African National Congress launched a health and education campaign on Friday, 15 August 2008 at Walter Sisulu Square in Kliptown. A decision was made at the ANC's Polokwane Conference that health and education should be at the centre of the ANC's social transformation programme for the next five years.

The education elements of the campaign would:

- conscientise citizens about the importance of education, and their roles, responsibilities and obligations towards education;
- mobilise communities to provide support to schools, teachers and learners;
- improve the quality of education for all children, adults and youth, especially the poor, and to have this improved quality reflected in better learner achievements.

The Quality Learning and Teaching Campaign (QLTC) grew out of this campaign and its aim is to put education at the heart of social transformation and involve all education stakeholders in this process. The national campaign was launched at Ikusasa Combined School in Tembisa on 09 October 2008. The Minister of Education, Naledi Pandor, made it clear at the launch of the

campaign that quality in education could only be achieved through the collective cooperation of department officials, school principals, learners and community members. These individuals were called upon to each make a commitment to a 'Code for Quality Education', which describes the responsibilities and discipline required of them.



Mr Duncan Hindle (Left) and the Minister of Education, Ms Naledi Pandor (Far Right) at the launch of the QLTC

Individual pledges were made by teacher unions, the principal of Ikusasa Combined School, a teacher from the school as well as a community member.

They all committed themselves to the following pledges:

- As a **Department Official**, I promise to support schools, ensure that all teaching resources are provided on time, improve my own skills base to better assist schools, regularly monitor teacher and learner attendance and to facilitate teacher development.
- As a **Teacher**, I promise to be on time, well-prepared for all my lessons, teach for at least seven hours every school day and improve my own skills and knowledge.
- As a **learner**, I promise to attend school regularly, to work hard in school, respect my teachers and adhere to the rules of my school.
- As a **parent**, I promise to support and protect my child's school, to cooperate with teachers and to create a conducive home environment for my child to study.

- As a **community**, we promise to ensure that every school-going child is at school, that schools are not vandalised and to report problems at schools to the relevant authorities.

2.2 THE EDUCATION CLIMATE

Edward Fiske (2002) wrote in an article entitled, "South Africa struggles to offer quality education to blacks", that under the apartheid regime, which lasted from 1948 to 1994, quality education was restricted to English and Afrikaans speaking whites, and schools serving the other major racial groups – black Africans, coloured and Indian – were inferior as a matter of policy.



Fiske said South Africa transformed itself into an open and democratic society with a constitution that guarantees educational rights to all South Africans regardless of race. The first challenge facing educational policymakers was to dismantle the formal structures of what had been known as Bantu Education.

The new government has made significant strides to transform the South African education system. A new curriculum was structured based around principles of 'outcomes-based education' that emphasised themes such as respect for diversity and democratic values.

According to Fiske (2002), the ratios of teachers to pupils were raised in previously black areas, and the salaries of teachers in black schools were brought up to parity with those of teachers in formerly white schools. The government also introduced a new formula for allocating funds for non-personnel costs that favoured schools serving disadvantaged communities.

South African Good news reported on 06 August 2008, that the Department of Education introduced five new policies that it hoped would yield positive results in the country's education system.

The Department's proposed changes included:

- The lowering of teacher pupil ratios
- The rearranging of districts into smaller manageable areas
- The expansion of Further Education and Training Colleges
- The rollout of internet connectivity to every school in the country by 2013

2.3 CHALLENGES AND ACHIEVEMENTS

The Minister of Education, Naledi Pandor admitted that the South African education system still faced many challenges. "We are a system that underperforms and fails to support learners to acquire key skills for learning. Our performance in mathematics and science subjects is dismal and we continue to be faced by inadequate infrastructure, poor and inefficient administration in some provinces and disaffected and demotivated teachers," she said. (SA Good News, 2008)

Pandor however believes there are some positive developments in education that have been achieved over the past few years. Among these is the increase in access to schooling for black children as well as the significant resources that are devoted to education with over 20% of the national budget going to education.

For matriculants, the Study Mate was launched in 2007, which is produced as a newspaper supplement and is distributed through Media24, Avusa Media, Independent Papers, a variety of community publications as well as departmental distribution points. The guides focus on the Grade 11 and 12 curricula with the education department providing exemplars and weekly guidelines in all the major subjects.

The objectives of the QLTC are in line with the plan that Graeme Bloch (2008) proposed for education in his article, "Fixing schools: a 30-year task". Bloch said the process of fixing the South African education system should start now and

that everyone should be on board, unified around a vision for a learning nation. He said the questions that we should ask are: What are our priorities and how will we get there? What are the landmarks and phases? Where will we start? Where do we expect to be in five, 10 or 30 years? Bloch affirmed that this debate is not once off but an ongoing process.

Apart from the DoE's initiatives to improve the quality of education in South Africa, communities around the country have also proven that they can play a major role in making education accessible to the youth and improving the quality of education. The Proudly Manenberg Campaign and the MaAfrika Tikkun Project are examples of successful community campaigns.

The Proudly Manenberg Campaign was formed by a group of former anti-apartheid activists who wanted to turn things around in Manenberg, a community in Cape Town that is notorious for gangs, drugs and crime. This campaign focuses on advancing young people in the community, particularly through education. In 2008, the campaign managed to give scholarships to 12 young people who would not have been able to attend university if it was not for the campaign.

Another positive community project is the MaAfrika Tikkun Project, which is a non-governmental, non-profit organisation that works towards the transformation of South African communities by caring for the vulnerable children and orphans in townships. These projects prove that schools can be improved at community level.

2.4 THE DIFFERENCE THAT THE QLTC CAN MAKE

There are numerous challenges that face education in South Africa, but the positive changes that the democratic government has made cannot be overlooked. The national education department in collaboration with provincial departments, have attempted to address some of the critical challenges in education through various programmes with varying degrees of success, such as the National Plan for Higher Education, the Values in Education Initiative, the ABET Act of 2000, the Kha Ri Gude mass literacy campaign, the Education-Management Policy Framework, and the South African Standard for Principalship for

school. The QLTC will add to this plan to transform education, but with the collective involvement of all parties in the education fraternity.

The national and provincial rollout of the campaign has already begun. Its success will depend greatly on our individual commitment to education as South African citizens. Each one of us are required to do our part to improve the quality of education in the country. The difference that one individual can make, whether as a teacher, learner or parent, will get us one step closer to making quality education for all South Africans a reality.

Bernice Davids

3. The Toledo Plan

By Dal Lawrence

Teacher evaluation procedures in public schools are modest in results, too often inept and constrained by traditional lines of authority. The Toledo Plan provides a concise guide for those who want to break away from traditional beliefs about personnel evaluation and get effective answers to these questions:

1. Who should teach?
2. Who should not teach?
3. How can we shorten the learning curve to ensure that new teachers become and remain competent?
4. How can we improve our teacher retention rate?
5. How can we broaden responsibility for instructional competence beyond the principal and school management?
6. Where does real reform begin?

3.1 A NOTE TO SCHOOL MANAGEMENT

Doing things the same way guarantees the same results: A wink at unsatisfactory practice, confrontations with the union over those rare dismissal attempts, too many people trying to evaluate who are too busy and too frustrated to get it right. Personnel evaluation is not what school people do best. Distrust and friction between teacher and management leaders are

the inevitable result of our current practices. The system of evaluation and professional improvement all of us have inherited is often dysfunctional despite our best intentions.

3.2 TRADITIONAL EVALUATION

School management more often avoids dealing with those who are inept or those who should not be teaching at all. Their performance is marked *needs improvement*, a recommendation that is vague, not helpful, and serves as an excuse for avoidance. The result is that worst-case termination scenarios fuel confrontations between union and management that in turn interfere with badly needed collaborative school improvement projects.

3.3 WHY THE TRADITIONAL MODEL DOES NOT GET RESULTS

- Principals are busy. Time is a key element in monitoring and evaluation
- Often principals are required to assist and evaluate outside their area of academic expertise
- Reliability and consistency among evaluators is compromised because too many principals evaluate, they are seldom monitored, and they often use different standards and procedures. Consistency is a problem and the lack of it usually rules out contract termination
- Annual evaluations tend to result in perfunctory reviews
- Procedural due process is important when dismissals are appealed. Often the facts and substance of a case do not prevail because the process was flawed
- Collaborative efforts and solutions are usually absent
- Teachers continue to think that a colleague's poor performance is someone else's problem.

Traditional evaluation does have its rewards. It is cheap unless someone sues. It does not disturb the authority model school administrators have come to rely on. And it gets the same results year after year. There is some comfort in that for those who are not risk-takers.

3.4 A BIRD'S EYE VIEW

This is what typically happens with an intern program based on peer review. The first employment year is designated the intern year. The mentor/evaluator is an accomplished teacher, usually called a consulting teacher, released full-time from teaching duties to work with 10-12 interns.

The consultant is solely responsible for mentoring and evaluation during the first year. During the first semester and second semester an evaluation of each intern's work is presented to a joint union-management panel which, in turn, votes to accept or reject the evaluation. The second semester evaluation contains a recommendation about future employment upon which the panel votes. The panel then forwards its decisions to the superintendent for concurrence.

The Peer Assistance and Review panel (PAR) represents a collaborative effort between union and management, this is standards-based and crucial to quality control issues. In Toledo, we place every new teacher in the program but allow consultants to recommend removal of those first year-teachers who come to us with previous experience but who do not need further assistance. New teachers without experience must remain as interns for an entire academic year. Consultants typically observe and counsel first-year teachers on average about 20 hours each semester. More time is spent in group sessions and report writing.

Toledo has a two-year probationary experience. One-year contracts are given. During the second year, principals evaluate with the same standards used during the intern year.

3.5 TWO FINGERS IN THE STEW

Collaboration does not mean everyone has to do the same thing at the same time. With evaluation it is essential that responsibility be fixed on one person, unless you are not serious about removing those who should not be teaching in your district. It does not matter who the two people are. Two teachers, two principals, a principal and a teacher, either way, you are asking for trouble.

For us that mean consulting teachers are solely responsible for the evaluation of all their interns the first two semesters and principals are solely responsible for semesters three and four. The same standards and criteria are used throughout the two-year probation and beyond. That configuration will provide collaboration that gets results and keeps you out of unnecessary trouble.

3.6 PRINCIPALS

In Toledo, consulting teachers are solely responsible for mentoring and evaluation the first year even to the point that administrators are discouraged from classroom observations. Principals do submit a form to the consulting teacher indicating compliance with individual school and district policies, cooperation with parents, punctuality and things that the consultant might not witness. The form is presented to the PAR panel along with the intern's evaluation.

During the second year of employment, principals are solely responsible for evaluation and mentoring. In twenty-two years, there has not been a second-year termination or non-renewal, and that speaks to the effectiveness of our intern year.

3.7 COMPOSITION

We use a nine-member board (four administrators and five teachers). Employment recommendations of consulting teachers in January and April must be confirmed or rejected by six votes. That works well for us. Teachers feel great ownership, which is important in the early years of a peer review program, and six votes encourage the panel members to work together. Toledo has had one 5-4 vote in the program's 22 years.

Some districts appoint seven members. The important thing is to have someone on the panel that is familiar with elementary, middle school, high school and special education. A human resources administrator should be on the panel because of contractual matters that arise.

3.8 MEETINGS

The panel does not have to meet to decide every detail. The co-chairs can manage the day-to-day questions that arise, and if the issue is important, you can send a confidential ballot to the other panel members.

3.9 BUDGET

We pay for the program out of local funds. Ohio's Department of Education has only recently supplied a small amount of money that can be used for peer review. Cost is an issue, but districts are investing in quality teaching staff. That is basic to successful schools.

3.10 FINDING CONSULTING TEACHERS

Some of the basic steps:

- Post the opportunity for teachers to apply
- Ask for references from four teachers and one administrator
- Interview (very important)
- Have unannounced peer observations of teaching. This requirement should be mentioned in the initial posting.

3.11 YOUR EVALUATION FORM

Evaluation necessarily results in ranking performance on some continuum or scale. Typically, teachers and administrators are outstanding, satisfactory, unsatisfactory, or they need improvement.

It is the needs improvement category that will need your attention. Whatever its original intent was, needs improvement quickly became a kind of general warning that performance should improve, but also the rigors of ending someone's employment. Unions have used it effectively for that purpose, as have administrators. Whether anyone actually improves varies widely from district-to-district and school-to-school.

Eliminate needs improvement. One academic year is sufficient to determine the future employment status of a beginning teacher. Consulting teachers are, after all human, and it is too tempting to postpone a contract non-renewal recommendation by marking needs improvement.

After the two-year probationary period, Toledo does not evaluate annually. Teachers who hold multi-year contracts, but do not qualify for tenure, are evaluated by principals every four years. If there is a problem, a consulting teacher is sent by the PAR panel to evaluate and report back to the panel. This is a practice that we implemented after our program started because we found it to be more effective than automatically relying on what was sent in from the school.

3.12 UNANTICIPATED CONSEQUENCES

Changes can often bring nasty little surprises, but peer review leads to a number of surprises that are both unanticipated and positive.

Traditionally, teachers take pride in their own work but feel little personal responsibility for a colleague's poor work. That attitude is alien to classis professional cultures such as medicine where a sense of community based on standards exists.

The buy-in to standards is triggered when teachers create their own standards of instructional practice. When teachers develop standards of practice that represent basic competencies needed to be a successful teacher, they develop a sense of common ownership in competent practice. That is the beginning of a community of teachers who take pride in each other's professional competence, and ownership is the key. You should consider this fundamental shift in attitude about one's work in relation to the work of others (individual vs. community) as a building block for all other school improvement or reform efforts. Successful reform depends on common efforts to achieve excellence and mutual pride in ownership of the means to do so.

When teachers own the induction process for their profession, other changes soon follow. The union will see a change in its culture. Instead of defending individuals, the union becomes a defender of its members' professional standards of practice. Traditionally, those of us on the union side spend an inordinate amount of time and money defending members whose practice is virtually unknown to us – and that makes no sense at all.

As the number of former consulting teachers increase, they become a voice for teacher excellence within the union. So do the former interns who were successful and who appreciated the help they received during their intern years. They see their union as a support for their teaching practices and not just a place to go when a problem occurs.

Administrators also change. It is not uncommon for principals and others to see peer review initially as an invasion of their turf. But that initial reluctance melts away once they see how seriously the standards are taken and the amount of time that is devoted to mentoring.

3.13 INTERVENTION

Confronting a colleague's instructional problems is definitely a learning experience for school people. It is also how a real profession should work. Intervention is the name we use for the peer review and assistance component of The Toledo Plan that addresses instructional deficiencies exhibited by veteran teachers.

3.14 IDENTIFICATION

Referrals should start at the school. That is where confronting the competence issue can be participatory within the context of professional accountability. Several identification procedures are in use. Rochester, New York assigns the responsibility solely to the principal. A negative evaluation leads to a choice for the teacher. Rather than simply face termination, teachers may appeal to the peer review panel and place themselves in intervention. Intervention is a choice.

In Toledo, we took the view that identification should involve the teachers at the school because we would enhance our goal of getting teachers to broaden their sense of responsibility for instruction. Initially, we required both the principal and the school's union committee (elected annually) to agree about intervention before their recommendation could be acted on by the PAR panel. Several years ago, we amended the process so that either the committee or principal can recommend unilaterally, and we preserved the right to act collaboratively.

3.15 WHERE TO START

People become uncomfortable when traditional workplace practices are altered. If you ask whether to start with an intern or intervention program, it is easier to start with first-year teachers. That way you can gain mentoring and evaluation experience in a way less threatening to teachers and principals. If your leadership, both union and management, has a good grasp of what can be accomplished with peer mentoring and review, and the leadership is respected, do both.

3.16 ADVICE FOR UNION LEADERSHIP

We poll our members before each set of negotiations. Since 1981, peer review has consistently garnered the largest consensus of support, 9 – 1, and this is after we have dismissed nearly 400 first-year teachers and 70 veterans. There is a lesson in that consensus. Teachers want to be respected for the excellence of their craft. Follow their aspirations. What do teachers aspire to be? Do not ask initially, "How would you like to do peer review?" because that will provoke the mental image of teachers walking in and out of each other's classrooms. Our tradition of isolation immediately comes into play.

Instead as, "How would a real profession for teachers based on standards and excellence operate?" That way, the various facets of the introduction process can be explained absent the hostility generated if you ask the first question. If we had asked our members about "peer review," there is little doubt that both administrators and teachers would have opposed the idea.

In 1973, we outlined the basic ideas for an intern program and asked our members in a referendum if they would support an effort to establish the program. The 4-1 favourable response shocked us because we did not think we would get close to that margin. Between 1973 and 1981, we put the proposal on the bargaining table and each time it was rejected. Principals thought it outrageous, and we were negotiating with school administrators unaccustomed to striking out in a new direction.

Persistence is definitely an ingredient in any reform effort.

3.17 WHERE DOES REAL REFORM BEGIN?

Education should be an inventor's paradise because there are so many things we can do differently and get better results. The fact is that most of what passes today as reform does little to challenge the basic assumptions of those of us who work in schools about roles, responsibilities and accountability. If ever an institution was dedicated to repeating tomorrow what it did yesterday and today, it is education. Invention is rare, and our critics are having a field day.

The urgency to get better results is greater than our urban districts, but all schools need to take a hard look at what needs to be corrected and peer review is a good place to start.

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