

ACE (School Management and Leadership)

Implementation guidelines



education

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Department of Education

Implementation Guidelines for

ACE (School Leadership)

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Foreword

The ACE (School Management and Leadership) represents an exciting initiative in the professional development of aspirant school principals.

This manual provides an overview of the design and expected delivery of the new programme.

Philosophy and thinking underpinning the ACE (School Management and Leadership) programme

The key focus of the ACE (School Management and Leadership) programme is to facilitate real transformation in schools that is grounded in recognition of the challenges of particular contexts and the values underpinning the South African Constitution. Principals and would-be principals must understand that it is not acceptable simply to pay lip service to the ideas presented in the programme, to develop policies that are not implemented in practice or to adopt a minimal compliance stance. Instead, a deliberate attempt is made to encourage critical reflection on current practices, planning for improvement, action based on informed understandings and monitoring and evaluation that is critical and responsive. The assessment tasks set for students in this programme must yield evidence that the school has changed for the better in ways that reflect a commitment to and practice of transformational leadership. In this process, critical issues such as gender equality, HIV/AIDS, and improved and improving learner performance must be squarely addressed.

Acronyms and Abbreviations

AC	Assessment Criteria
ACE	Advanced Certificate in Education
CCFO	Critical cross-field outcome
DSG	Development Support Group
EC DoE	Eastern Cape Department of Education
EMD	Education Management Development
ETQA	Education and Training Quality Assurance body
INSET	In-service Education and Training
IQMS	Integrated Quality Management System
NCS	National Curriculum Statement
NLH	Notional Learning Hours – an estimate of actual study time
NLRD	National Learners' Records Database
NQF	National Qualifications Framework
OBA	Outcomes-Based Assessment
OBE	Outcomes-Based Education
PGP	Personal Growth Plan
PoE	Portfolio of Evidence
RPL	Recognition of Prior Learning
SACE	South African Council of Educators
SAQA	South African Qualifications Authority
SDT	Staff Development Team
SGB	School Governing Body
SGB	Standards Generating Body
SMT	School Management Team
SO	Specific Outcome
US	Unit Standard

Overview

Word of welcome

Welcome to this implementation guide for the ACE (School Leadership) programme. The aim of this implementation guide is to help HEIs identify the key design and delivery implications of the programme. It will be complemented by a training session.

By the time you have finished working through this manual, we hope that you will feel better able to:

- identify the key design characteristics of the programme
- identify key questions and issues which your institution will need to address in planning for the implementation of the programme
- identify the assessment criteria linked to each module of the programme.

Structure

The manual is divided into three sections as detailed below.

Section 1: Programme overview

Section 2: Key questions and issues

Section 3: Assessment rubrics.

Section 1: Programme overview

1.1 General introduction

Welcome to the Advanced Certificate: Education (School Management and Leadership).

1.2 Who is this programme for?

The ACE programme is aimed at empowering school leaders to lead and manage schools effectively in a time of great change, challenge and opportunity. It is targeted at serving School Management Team members who aspire to principalship.

1.3 What is the purpose of this programme?

The programme seeks to provide structured learning opportunities that promote quality education in South African schools through the development of a corps of education leaders who apply critical understanding, values, knowledge and skills to school leadership and management within the vision of democratic transformation.

It seeks to empower/enable these educators to develop the skills, knowledge, and values needed to lead and manage schools effectively and to contribute to improving the delivery of education across the school system.

1.4 How is the programme structured?

The ACE (School Leadership) is a programme that has been registered on the NQF at NQF Level 6 with an exit level at REQV14.

The programme will normally take two years of part-time study to complete.

Each component of the programme comprises a number of modules as summarized in the table below.

COMPONENT	MODULE	RELATED UNIT STANDARD	NUMBER OF CREDITS
Fundamental	Develop a portfolio to demonstrate school leadership and management competence	115438	10
	Lead and manage effective use of ICTs in South African Schools	Unique to this programme but subsuming 115433	10
Core	Language in leadership and management	115440	10
	Understand school leadership and management in the South African context	115441	10
	Managing teaching and learning	115436	20
	Lead and manage people	115437	20
	Manage organizational systems, physical and financial resources	115434	20
	Manage policy, planning, school development and governance	115439	20
Elective (Optional – alternative electives may be required by different HEIs in line with changing national, provincial priorities)	Lead and manage subject areas/learning areas/phase	115435	12
	Mentor school managers and manage mentoring programme in schools	115432	12
	Plan and conduct assessment	115753	15
	Moderate assessment	7977	10

1.5 What are the strengths of the programme?

The programme focuses on leadership and management development in three main ways, by:

- reinforcing critical learning principles
- adopting a developmental assessment approach
- pursuing a transformational agenda.

1.5.1 Critical learning principles

The following learning principles underpin the teaching and assessment of the programme:

- Directed and self-directed learning in teams and clusters
- Site based learning (dependent on the content)
- Variety of learning strategies i.e. lectures, practice and research portfolios amongst others
- Parallel use throughout of individual and group contexts of learning
- Collaborative learning through interactive group activities e.g. simulations, debates
- Problem-focused deliberation and debate in group contexts
- Critical reflection on group processes, group effectiveness
- Critical reflection and reporting on personal growth and insights developed
- Research and experimentation.

1.5.2 A developmental approach to assessment

The assessment strategy includes a variety of options to demonstrate and provide evidence of practice, based on the anticipated outcomes and against the assessment criteria. Depending on the institution and circumstances, this could include activities such as case studies, problem solving assignments, practice in simulated and in real contexts, projects, written and oral presentations.

- The assessment is focused on applied competence. The assessment evidence should include:
 - o Assignments and/or examinations, providing evidence of the ability to apply knowledge to practice
 - o Oral Presentations, which should be observed in context to observe ability to communicate with comprehension
 - o Two or more work based projects to demonstrate the application of the learning and insights from preferably the core modules
 - o A portfolio of practice evidence, which will support all modules
 - o Evidence of self-, peer-, tutor assessment as well as on-site verification of leadership and management competence.

As students work through the programme, they will keep a reflective journal and prepare a portfolio of evidence of their growth and achievements. This evidence will contribute towards their final summative assessment.

1.5.3 A transformational agenda

The programme is offered through a practice-based part-time mode so that students can work and learn at the same time. They will find that about 50% of the work that they need to do for the programme comprises activities that they will plan, execute and evaluate at their school. By the time they have completed the programme, it should be possible to provide evidence that their participation has helped to change their school for the better.

1.6 Introduction to the modules that comprise the programme

This section provides an overview of each module in the programme organized into the sequence in which students will most likely engage with them. The overview can be cross-referenced with the relevant unit standard in the course outline and the associated analytic assessment rubric in part three of this document.

1.6.1 Develop a portfolio to demonstrate school leadership and management competence (fundamental - but cannot be RPLed)

The main purpose of this module is to assist students to compile a reflective portfolio with evidence of their competence in school management and leadership. The secondary purpose is to enable them to understand the use of portfolios as an assessment instrument, so that they will be able to promote their use for assessing learners in their school. The module should enable students to successfully complete the unit standard, 'Develop a portfolio to demonstrate school management and leadership' (SAQA ID number 115438) which is included in the ACE qualification. The module will also assist them to put together relevant evidence to demonstrate their competence in the other unit standards of the ACE qualification.

The portfolio unit standard has been included in the qualification because the designers of the qualification assumed that not all students in this programme would know how to develop a portfolio that reflects their management and leadership competence. Therefore this module guides them through the process of developing a reflective portfolio to record all evidence relevant to the core unit standards of the ACE qualification that cover the key competencies of school managers/leaders.

These core unit standards are described in the portfolio unit standard as the 'core exit level outcomes':

- Demonstrate effective language skills in school leadership and management (ID number 115440);
- Manage policy, planning, school development and governance (ID number 115439);
- Lead and manage people (ID number 115437);
- Manage organizational systems and physical and financial resources (ID number 115434); and

- Managing teaching and learning (ID number 115436).

The final portfolio will therefore be a comprehensive record of all the evidence that students produced during these core modules of the programme, which would include completed assignments, written tests and work-based projects. The portfolio will also contain relevant evidence that students may have produced during the execution of their regular school management/leadership functions, either before or during the programme, on condition that these relate directly to the outcomes in the above-mentioned core unit standards. The portfolio will also include a journal that represents a working document linked to all the modules in the programme as determined by each HEI.

1.6.2 Lead and manage effective use of ICTs in schools (fundamental – can be RPLed)

This module is premised on the understanding that it is difficult for a school leader and manager to be optimally effective without making use of computer technology at least at a basic level to create documents, manage information, speed up routine procedures and data processing and stay informed about changes that will impact on the school. The module first makes the case for why school leaders and managers should seek to develop their computer literacy skills and then proceeds into a formal basic introduction to the nature of computers, how they work and the names and functions of the various parts. The module makes a deliberate attempt to demystify the technology and to examine how the day-to-day tasks of the leader and manager could be simplified by the use of appropriate technology and software. The module therefore provides basic skills for navigating and using word-processing, database, spreadsheet and internet/email functions to optimise daily functions such as recording, reporting, budgeting and curriculum design and delivery. It then briefly explores how ICTs may be integrated optimally into teaching, learning and management processes.

1.6.3 Understand school leadership and management in the South African context (core)

This module gives an overview of what management and leadership is about in a school setting. From the perspective of an aspiring principal it begins a process of developing understanding about the challenges that face principals on a daily basis and allows students to also explore their own realities and decide on new and better action. In addition, they will look at some of the international trends in management and leadership and will compare what is happening in the South Africa scene to others.

The main purpose of this module is to give students an understanding of some of the debates around leading and managing schools and to frame these debates within three scenarios,

namely: a reflection of themselves as a future leader within the realities they have to face on a daily basis, a reflection of themselves as a team player but also a leader and manager of the school and finally a reflection of their work as a present day manager within the context of the broader educational field.

In completing this range of reflections they will be learning a skill to help them complete their learning journal and portfolio. This will in turn set a benchmark for their work and for the way that they continue to work when completing the other modules.

In many ways this module sets the foundation on which the core programme is built. It raises issues which are therefore explored in the other core modules dealing with leading and managing people, policy, language, organisational, physical and financial resources and managing teaching and learning in more detail.

1.6.4 Language in leadership and management (core)

This module serves a dual purpose. On the one hand it is aimed at developing the reading, writing, speaking and listening skills students need to successfully work their way through all the modules included in this ACE programme. On the other hand the module is aimed at providing them with the ability to use language as a management and leadership tool, specifically in the area of policy development and implementation.

This module explores a number of questions and/or issues, namely:

- How can educational managers and leaders use language to inform, educate and influence people? This question is explored in Units 1, 2 and 3.
- How can the effective use of language enhance communication and establish supportive relationships with those inside and outside schools? This question is explored in Units 1, 2 and 3.
- Which writing skills should school principals and classroom teachers have in order to effectively perform their respective management and leadership functions? This question is explored in Unit 3.
- What skills are required to critically read and understand policy documents? This question is explored in Units 4 and 5.

1.6.5 Manage policy, planning, school development and governance (core)

This core module is about understanding, and managing the requirements of education law, policy, planning, school development and governance, and the changes which schools must implement and manage.

The module examines the role of the principal and school management team in managing policy, planning, governance and school development. It considers how values, vision and

mission can be developed and communicated within the school as an organisation, and the personal characteristics of the principal in establishing and maintaining these key areas. It foregrounds the knowledge, and the actions which school leaders must take to comply with the legislative and policy requirements, as critical to the functionality of the school through good management and governance.

1.6.6 Lead and manage people (core)

There seems to be a movement away from the term human resource management and instead “people management and leadership” is presently used when dealing with the people in the organization, which implies that it is the people in a school who ‘win or lose the battle’ towards achieving the set goals.

It is increasingly acknowledged that people play a critical role in the school and that people leadership and management has ultimately become the responsibility of the SMT (School Management Team) of a school. The Minister of Education, Naledi Pandor, expressed her concern about education leadership by saying:

“We have a (school) leadership that cannot analyse, cannot problem-solve, cannot devise strategic interventions and plans and cannot formulate perspectives that are directed at achieving success”.

(Business Day, 30 December 2004)

This type of concern correlates with the views of Jones and George (2003:98) that refer to the role of the leader to set the values, norms and standards for behaviour, and to communicate the expectations that influence the way in which individuals, groups and teams interact with one another and co-operate to achieve organisational goals.

The task of people leadership and management reveals both a tactical and a strategic role within every aspect of planning, allocating, supporting and evaluating work, as well as developing personal and professional skills and creating an environment conducive to collective bargaining, collaboration and negotiation.

The module explores these issues through a set of expanding lenses that begin by exploring personal qualities with reference to relevant theory and then move on to consider management of oneself and others, staffing and labour relations.

1.6.7 Manage organisational systems, physical and financial resources (core)

This module examines the structures, systems and processes that should be established in order for a school to be effective. The expectation of all stakeholders in the school environment is that an effective school will be able to provide an education of progressively higher quality for all learners.

The premise of this module is that effective education is built upon, and grounded in, policies, principles and values. The acts, regulations and policies of national and provincial governments have created the framework and values within which the school's organisational systems, and physical and financial resources should be managed.

If a school is to be managed effectively, it must be well organised, and this applies to every part of the school system. Furthermore, the interrelationships between the different systems must also be managed effectively, since they depend on one another for effective functioning.

A school is an organisation that consists of many different parts. The principal is not only an educational manager; he/she is also the leader of the school, and a vital part of his/her role is to manage the school's organisational systems and physical and financial resources.

This module further holds that there are certain core areas of performance that are essential for schools to be successful and fulfil their mandates. These core performance areas are the elements from the model for 'whole-school development', which are dealt with in more detail in the module. The core performance areas are interrelated and are supportive of one another. Similarly, any one policy or principle of the legislative framework governs a number of these core areas of performance. Examples of core areas of performance are effective leadership and management, information management and communication systems.

1.6.8 Managing teaching and learning (core)

This module focuses on the core business of transforming schools, that of teaching and learning. The purpose of this module is to enable students to acquire relevant knowledge and skills as well as to develop appropriate attitudes and values in order to manage teaching and learning effectively.

The module begins by exploring the school as a learning organization and promoting a culture of learning and teaching, which is dedicated to constant renewal and improvement. It also tackles the issue of context, and looks at the ways in which the physical environment of the school impacts on the quality of learning. This leads into an exploration of the challenges of effectively planning, implementing, monitoring and evaluating a curriculum that needs constantly to change and reinvent itself in line with the changing needs of a changing society. In particular, the module focuses on what is required to improve teaching and learning in order to produce enhanced learner outcomes. This paves the way for the identification and development of the skills and processes needed to lead and manage effective teaching and learning.

1.6.9 Lead and manage a subject, learning area or phase (elective)

The purpose of this module is to develop effective curriculum leaders and managers who will enhance the quality of teaching and learning through application of the theories, concepts and issues handled in this module. It is hoped that in examining these issues school principals and SMT members will be more conscious of their role of leading and facilitating transformation in schools.

The module focuses on management and leadership regarding implementation of subject and learning areas in different phases of learning and teaching, from Grade R to Grade 12.

It should be noted that many of the topics and issues discussed in this module feature in other modules as well, particularly the core module on *Managing Teaching and Learning*. However, this module deals with these topics from the perspective of formal curriculum delivery at school and classroom level. Curriculum delivery in this sense means the implementation of subject and learning areas in all phases of schooling. Learning Outcomes and syllabuses as well as the subjects and learning areas are documented into a curriculum for schools. Viewed from this perspective, this module is about curriculum delivery.

1.6.10 Mentor school managers and manage mentoring programmes in schools (elective)

Mentoring is increasingly seen as an effective way of helping people develop in their jobs and careers.

In a constantly changing environment, there is a great need for people to change, adopt and adapt to the changes. This is no less true of schools. School managers seem to be natural candidates as mentors in schools. They have an important role to play in developing their colleagues to cope with the new pressures and new imperatives. In view of the changes, all school managers are expected to be seeking to add value to their schools by acquiring mentoring skills and the ability to manage mentoring programmes.

In the South African context the changes mentioned above include the introduction of the new curriculum, a new approach to school governance where the community is encouraged to be actively involved and participatory management of schools.

The mentoring programmes and mentoring skills which schools are supposed to develop are also relevant to teachers whose responsibilities may include mentoring other educators so that high quality teaching and effective use of resources result in improved standards of achievement for all learners. This module aims at empowering school managers and teachers to develop and implement appropriate mentoring programmes.

1.6.11 Plan and conduct assessment (elective)

The focus of this module is not on assessment *per se* but on its management and/or administration. In this module they will learn how to *plan for and conduct assessment* in such a way that it becomes an integral part of the teaching and learning programme rather than an additional administrative burden.

A well-conceived assessment plan does not only benefit teachers; it also contributes to more effective learning in the sense that learners know beforehand when and how assessments will be conducted and are therefore able to plan ahead, accepting some responsibility for their own learning as stipulated in the SAQA critical cross-field outcomes. In addition, it might help to change perceptions of assessment as an event to be dreaded to a perception of assessment as a learning experience, a process that is not aimed at 'catching out' learners but rather at supporting and monitoring their learning towards the achievement of pre-determined outcomes.

Siebörger (1998:75) suggests that the way assessment takes place in a school is an important indicator of the overall quality of that school, not only in terms of the academic achievements of the learners, but also in terms of the extent to which the school is achieving its aims and contributing to national aims and goals. Siebörger's comments link *assessment* with *management, administration and leadership*, another role required of all teachers and a role that is particularly pertinent to the *Advanced Certificate in Education (School Leadership)*. In this regard the *Norms and Standards for Educators*, states that educators will be required to 'make decisions appropriate to the level (concerned), manage learning in the classroom, carry out classroom administrative duties efficiently and participate in school decision-making structures ... in ways which are democratic, which support learners and colleagues, and which demonstrate responsiveness to changing circumstances and needs'.

This module is aimed at helping students perform these roles to the best of their ability. As such, it provides them with information on assessment and evaluation in general and on outcomes-based assessment in particular.

It attempts to show them how assessment contributes to quality teaching and learning and how it promotes accountability. Most importantly, though, it places assessment in a systemic context, indicating how it could be used as a tool for transformation.

What this module does not do is to teach students how to design assessment instruments or how to integrate assessment into teaching and learning. These aspects of assessment are dealt with in other modules in this course. The design of this module is, therefore, informed by the assumption that students have already mastered the basics of assessment, that they know how to design assessment instruments and that their school has an assessment policy in place. In this sense this module builds on previous modules that dealt with teaching, learning, management and policy development. Its purpose is two-fold: to stimulate critical thinking on assessment, with particular reference to outcomes-based assessment, and to enable students to effectively and efficiently manage assessment at different systemic levels.

1.6.12 Moderate assessment (elective)

The focus of this module is on the moderation of assessment. With the current emphasis on accountability and quality assurance in education all over the world, moderation has become a crucial means of ensuring fairness and consistency in educational assessments. Ensuring the quality, fairness and integrity of assessments is also a crucial part of educational management.

With the move to outcomes-based education, which is an assessment intensive system, there has been a need to ensure that the quality of assessment does not negatively impact on teaching and learning. In the past, the bulk of quality assurance activities took place externally to the school itself – with the Grade 12 external examination being the prime indicator of the quality of education taking place at a particular school. In outcomes-based education, schools themselves have to accept this responsibility. It is, therefore, important to ensure that all educators, but especially educational managers, have the knowledge and/or expertise to establish and maintain systems and processes that reflect best practice. Moderation is one such process and this module is aimed at assisting current and aspiring educational managers to develop the requisite expertise in this area.

Based on the assumption that everyone that is registered for this module is an educator and that all of them are aspiring to be educational managers some day, the learning content has been carefully selected to reflect educational situations where a critical understanding of quality assurance, standards and moderation is crucial. Consequently, the activities and assignments in this module require students to apply everything they learn in establishing and maintaining moderation systems and processes to their own school.

Section 2: Key questions and issues

In this section we identify **some** of the questions and issues that HEIs will need to address in their planning for the roll-out of the ACE (School Management and Leadership). The issues and questions have been divided into three sections as follows:

2.1 Programme issues

- 2.1.1 Programme purpose, nature, sequencing and pacing
- 2.1.2 Assessment planning
- 2.1.3 Communication with students.

2.2 Optimising contact support

- 2.2.1 Planning contact sessions
- 2.2.3 Planning site-based support.

2.3 General learner support issues

- 2.3.1 Open learning and adult students
- 2.3.2 Planning, facilitating and evaluating networking contact sessions
- 2.3.3 The facilitator as a counsellor
- 2.3.4 Providing feedback on assessment
- 2.3.5 Monitoring student progress.

The issues and questions identified in this section are illustrative only. There may well be additional issues and questions that will arise as HEIs engage with their planning processes. We will first present the questions that have occurred to us. Then we will discuss some of the issues related to finding answers to these questions. At the end of each section, we present a case study of a fictional HEI called the National University of South Africa (NUSA). The NUSA case studies represent **one** way in which the questions and issues discussed might be addressed and are based on experience of practises at several HEIs. The case studies should not be construed as **the** answer but rather as **an** answer to the questions posed. You may well disagree with NUSA's approach, but hopefully the case study will serve to help focus your own institutional discussions.

2.1 Overview of programme issues and questions

2.1.1 Programme purpose, nature, sequencing and pacing

Key questions

Does everybody involved share a common understanding of the purpose and nature of the programme?

In what sequence will students work through the modules?

How will the workload be split between semesters and years of study?

How will the institution ensure that students remain on track with the workload and cross-cutting activities such as the development of their portfolios?

Discussion

By the time that you read this, we assume that you will have already engaged with the programme overview in Section One of this guide. This programme overview appears in the Portfolio and Context modules that underpin the ACE (SML) programme because we want students to think of the modules as parts of a coherent, integrated programme and not as discrete sets of information to be “passed” and forgotten.

What are the key design concerns of the programme? The first main emphasis in this programme is to understand the importance of **context**. The core module *Understand School Leadership and Management in Context* can be seen as the foundational module of the programme in this regard.

In designing and developing the materials, we have been guided by the following criteria:

A consistent, integrated but explicit common understanding across the modules

We have tried to ensure that here is a consistent ‘voice’ or awareness through all the modules of the programme: the modules speak from a position of authority (a value position) about matters such as: the moral purpose of leadership in the South African context and in schools; the constitutional basis of power and acceptance of the exercise of authority/leadership within the rule of law – subject to transparency, accountability, inclusion, participative processes, legitimacy; confidence in the underlying values regarding transformation of society through educational leadership; the multiple roles of school leadership and management; the relationship of the student/candidate to knowledge, skills, values, personal attributes/behaviour – i.e. learning is not to master knowledge but to apply

it responsibly in a given social context; and the fact that leadership and management is primarily not an efficiency matter but about building people – staff and students. Assessment tasks set by HEIs will have a key role to play in making this a reality.

A strong and focused sense communicated of the strategic importance of the ACE

This ACE is about developing principalship. The aim of the programme is to make a major intervention into South African society and build effective democratic citizenship through more effective leadership in the principalship of the nation's schools. The material invites in candidates a mind set that asks:

- What are my/our goals and aspirations?
- Where do I fit in?
- Who do I need to work with and how will we win (reach the goals)?
- What capabilities do I/we have?
- What leadership and management skills, systems and structures do I/we need?

A pervading sense of how directly the South African context influences the purpose of the modules, the knowledge they impart and the practices they encourage

Here we are concerned with issues such as relevance, immediacy, authenticity, challenge, appeal and opportunity. It is absolutely essential to have the required impact *in the South African context*, and this ACE programme therefore tries to establish its notions of leadership and management, especially the role of the principal, fundamentally in certain realities of the country's actual context.

Underpinning values

This ACE programme aims at developing leadership and management that supports ideals such as 'transformation', 'empowerment' and 'democratisation'. To stop these from being merely rhetorical, we have tried to ensure consistent and conscious awareness in all the modules of governance, leadership and management as being to do with the exercise of power and authority. If justice and legitimacy are taken as central values to do with power, then there needs to be quite a strong emphasis on values and evidence of behaviour that are conducive to justice and legitimacy, e.g. accountability, transparency, openness, fairness, giving a voice, hearing all sides, participation, inclusion, due process, right of appeal, administrative justice, etc.

Knowledge base, theory

As already suggested above there should be a sense of engaging with knowledge and knowledge construction throughout the programme. Part of the context of this ACE

programme is that it proposes/invites an innovative approach to theory and knowledge building. Being site-based and with the strong role for the portfolio (including the emphasis on being a 'critical reflective practitioner'), we want to teach the candidate a habit of using their own and others' narratives and the experience of their own school contexts as a primary research resource. In this programme theorising therefore means to think abstractly, analytically and critically about one's own situation and plan actively to improve it.

Applied knowledge

This has been an underpinning value and methodological approach from the outset, and so should be strongly apparent in all modules. This is indicated in a strong emphasis on all forms of practice; site based activity; a school focus; the candidate being actively involved in leadership, management and organizational behaviour; working in relationships, with teams and within multiple structures. It also, hopefully, contradicts the supposed dichotomy between theory and practice by showing how critical reflection (review, 'research') is an activity that leaders must do themselves, initiate, or lead others to do and that leads to strategizing, planning change (speculating, 'theorising') and implementing action plans.

The student's context

As opposed to the broad South African context, it has been agreed that modules and assessment activities should, as far as possible, be relevant to and feasible in the local context where the candidate operates. This means that examples, exercises and applications must give scope for a wide range of situations and responses, from urban, township, privileged elite, rural, and assume both high and low Provincial Education Department support.

Personal reflection; growth

This has also been stressed as a key methodological strand and a main outcome of the programme.

Assessment methodology

This will be a subject for discussion during a workshop with HEIs. However, key features under this heading are:

- Relevance and actuality for the most part strongly task- and site-based in line with the other criteria mentioned above
- As much integration as possible, i.e. not a proliferation of activities; three or four main activities per module

- Where possible, building awareness of other modules – although for the most part, other than in the portfolio, it is not feasible to combine assessment for more than one module when these are not studied concurrently
- A balanced distribution of work-load between modules (in line with credits)
- The feasibility of the assessment – i.e. how will it be assessed, by whom and when?

Technical aspects; presentation.

This covers issues such as how theoretical matter is incorporated, e.g. blocks of quoted text; how much referencing is done and how; length of paragraphs and variation of style within blocks of text; frequency of headings and subheadings; ‘units’ within modules – how conceived and how divided, including volume of text per ‘unit’.

With respect to this last item, an attempt has been made to design materials in a format that facilitates independent study, in line with the ‘studying while working’ practice-based nature of the programme, but also to provide the materials in ways that institutions can use and adapt most easily. For this reason, the materials have been developed in an MSWord template that allows for fairly easy adaptation and also in a PDF format where institutions can choose to use the materials in their original format without further adaptation.

It will be noted from the programme outline in Section One that there are twelve modules in the programme: two fundamentals (only one of which can be RPLed); six core and four electives. Institutions will need to decide what seems like the most appropriate sequence and workload pacing to suit their own need and context.

How NUSA responded

NUSA constituted a core programme team of six academic staff to run the programme. Each staff member was allocated two modules and 20% of their workload time (320 hours) to implement the programme. One member of the team was allocated an extra 10% (160 hours) to take overall responsibility for managing and coordinating the programme.

The core team put two days aside to brainstorm the purpose and nature of the programme and to tease out the practical implications for implementation. They invited members of various support departments such as postal administration and finance to participate in this workshop. Having found the discussions very useful in clarifying their own thinking, the workshop agreed that students needed to receive an ‘orientation’ to the programme both in print form and during the first contact session.

The meeting further agreed that a semester system would work best for NUSA, and the following sequencing was decided upon:

Year One, Semester One:

Fundamental: Basic computer literacy for school management (or RPL)

Fundamental: Develop a portfolio to demonstrate school management and leadership competence

Core: Understand school leadership and management in the South African context.

Core: Demonstrate effective language skills in school management and leadership

This would take care of the fundamental and foundational issues and activities that would cut across the programme from start to end. On completion of the Context module, students would embark on their first school-based project.

Year One, Semester Two:

Core: Manage policy, planning, school development and governance

Core: Manage organisational systems, physical and financial resources

It was felt that these modules would extend the cross-cutting issues introduced in the context module.

Year Two, Semester One:

Core: Lead and manage people

Core: Managing teaching and learning

It was felt that the first core module would complete the suite of necessary inputs for success, recognising in particular that schools are people-based entities. The second core module would represent the rationale for the core programme – the reason for having schools at all and the central processes that are dependent for their success in appropriate leadership and management of the issues covered in the other core modules.

At the end of this Semester, students would be expected to start on their second and major site-based project.

Year Two, Semester Two:

*Any **two** electives, with the caveat that **Moderate assessment** would require prior completion of **Plan and conduct assessment** or an appropriate RPL process.*

Submission of second site-based project.

Submission of completed portfolio.

*Although completion of **two** electives would take students slightly over the 120 credits needed for an ACE, it was felt that this could be managed given the practice-based nature of the programme. In addition, NUSA wanted to encourage (but would not force) all students to take at least the first*

assessment module because experience had shown that assessment was a problem area for many school-based educators.

2.1.2 Assessment planning

Key questions

The key assessment tasks for the programme as a whole comprise a portfolio and at least two integrated workplace-based projects. What tasks and evidence will the institution require with respect to these key elements of the assessment strategy?

Institutions may, and probably will, wish to set additional assessment tasks in addition to the above integrating activities. What will these additional tasks comprise of? How much study time will they require? When will students complete them? When and how will they get feedback? What will happen if students do not perform well on these additional tasks?

How will RPL of Fundamental modules be managed?

Discussion

Many Higher Education Institutions have student information systems that are premised on modularisation and which require a year mark based on work completed throughout the course and an examination mark. The three main cross-cutting integrated tasks required by the programme design therefore present something of a challenge. In addition, there is a danger that in the wish to emphasise the achievement of integrated programme exit level outcomes, we do not provide students with sufficient opportunity to master the constituent parts of the programme.

The integrated, workplace-based projects and the portfolio could draw upon smaller assessment tasks that are more module-specific.

Given the transformational nature of the programme, it also seems clear that the projects need to guide students through a development cycle involving observation, analysis and evaluation of the current state of affairs at the school; identification of areas for improvement; development of an intervention strategy of some kind; implementation of the strategy; evaluation, reflection and re-planning. If the programme fails to engage students in activities of this nature, it cannot hope to bring about change.

The portfolio needs to be more than simply a collection of information. It needs to tell a story about the student's experiences and growth throughout the programme as well as indicating the breadth and depth of his/her learning. Clearly, there must be a careful orientation to the

portfolio and continuing support thereafter. Students must also realise that although they can include evidence of achievement in the form of work outputs from other modules, what will make that evidence an appropriate portfolio item will be the accompanying reflective narrative explaining the rationale for their choice and what they have learned from the process.

It should be noted that RPL can be granted for only one of the two fundamental modules. The RPL process should be explained on registration and completed as quickly as possible, preferably even before students start the main programme. The essence of the RPL process, is that students must provide evidence that they can achieve the relevant exit level outcomes of the module. How they managed to acquire the necessary knowledge, skills, attitudes and values embedded in the outcomes is irrelevant.

How NUSA responded

NUSA understood that the fundamental modules dealt with knowledge, skills and attitudes/values that would be used by other modules throughout the course. Therefore they placed these modules in the first semester. When students enquired and/or registered, the RPL process for the ICT module was explained to them. In essence, NUSA's institutional RPL process allowed for a direct credit exchange if students had completed an equivalent course at another accredited institution (e.g. an assessed ETDP SETA course for the unit standard; a beginner's computer course of about 40 hours from a reputable provider) or the compilation of a portfolio of evidence of equivalent competence and/or a challenge test on the necessary competences. The RPL applications and evaluation had to be completed by the middle of the first semester (preferably earlier; and if possible before the programme commenced).

Like most institutions, NUSA's student system required a year mark and an exam mark per module. In addition, the NUSA programme team wanted to prepare students with smaller tasks ahead of the major projects.

The team therefore agreed to set two additional assignments per module (thus addressing the system requirements). The two assignments would build on one another and provide insights and evidence that would be useful for the major projects. The two assignments per module would be weighted at 40% and 60% (so that students could use feedback on the first to improve the second and so still do quite well).

The two assignments per module were to require school-based application of the issues addressed in the module, and should take the average student about 20% of the notional learning time for a module to complete. In essence, then, the module-specific assessments would account for 20% of the site-based practice requirement. The assignments would be marked by regionalised marking teams involving the

local tutors and one or more members of the core programme team. These assignment tasks would be designed after the tasks for the two site-based projects had been designed so that it could be ensured that the assignments would build the necessary competences to undertake the cross-cutting projects.

NUSA students would also complete two site-based projects. The first would represent some form of baseline assessment of the school's current performance. The programme team agreed that this task would involve a guided critical evaluation of the school's improvement plan and the development, in consultation with the wider school community, of an improved plan for the next cycle. The evaluation and re-development would need to address demonstrably all of the key issues to be explored in the core modules. It was expected that this activity would take at least 120 hours or 15 days to complete properly – that is 10% of the NLH for the programme. The project, as with the portfolio, would involve self-, peer- and tutor assessment against a set of criteria and central moderation by the programme team.

The second project would involve the development and implementation of a mini-action research investigation into one or more issues raised in or suggested by engagement with the core and/or chosen electives. This would be expected to take about 120 hours or 15 days to complete and would therefore represent the remaining 10% of practice-based work and assessment.

On average, NUSA students could expect to be spending their time as follows:

- Institutional contact sessions led by local tutors – 10% NLH
- Cluster/study group sessions led by students – 10% NLH
- Practice-based, module-specific assignments – 20% NLH
- Project 1 based on core programme – 10% NLH
- Project 2 based on elective options – 10% NLH
- Portfolio development – 10% NLH
- Independent reading/activities – 30% NLH.

Students achieving only Level 1 or 2 in respect of the relevant analytic rubric would be counselled by the local tutor, or in extreme cases referred to a member of the core programme team, and would then have a further three weeks in which to redo and resubmit the task.

From a systems perspective, the portfolio, with its constituent school-based projects and journal, would be classified as 'additional departmental requirements'. In order to get an overall pass, students would need to get a Level 3 rating or above for each module and an equivalent rating for the portfolio. For a distinction, all modules would have to be rated at Level 4 or above and the portfolio at Level 5.

2.1.3 Communication with students

Key question

It is expected that students will spend only about 10% of the notional learning time in institutional contact sessions. How will the institution then maintain communications with students before and during the course of the year on issues such as: programme design and assessment requirements, module design and assessment requirements, contact sessions, workplace-based assessment and support, formative and summative feedback on assessment tasks?

Discussion

In this programme, students spend most of their time 'studying' while working at their schools. Although it is expected that HEIs will offer at least 10% of NLH in the form of institutional contact sessions, these sessions might not happen at the main campus and might not be led by members of the core ACE (SML) team. Clearly, therefore, ways must be found of encouraging two-way communication between students and the providing institution.

How NUSA responded

NUSA is located near a provincial border and traditionally draws its students from three different provinces. For the ACE (SML) programme, the NUSA team had met with provincial authorities and agreed to accommodate 100 learners from each province, spread over 9-12 school clusters per province. It was agreed that NUSA would identify, recruit, train and monitor appropriately-qualified local tutors who would have primary responsibility for communicating with students. These local tutors would be given a telephone allowance and would be expected to be available to students telephonically, between negotiated hours, for student queries. Each institutional contact session would have a session about 'general' issues including updates on the latest programme information.

NUSA also developed a system of tutorial letters to address this. Students would receive two kinds of tutorial letter from the institution:

- *P-series tutorial letters which would talk about the whole programme*
- *M-series tutorial letters which would talk about particular modules.*

The P-series of letters would cover topics such as:

- *P01 An overview of the programme*
- *P02 Assessment strategy for the programme*
- *P03 Arrangements for contact sessions*

- P04 Arrangements for site visits
- P05 Programme changes and updates etc.

The M-series of letters would cover topics such as:

- M01 Overview of module and assignments for the year
- M02 Module changes and updates
- M03 General feedback on assignment 1
- M04 General feedback on assignment 2
- M05 General feedback on assignment 3 and examination preparation etc.

These tutorial letters would be posted to students and would be available digitally on-line to registered students. (PO1, PO2 and MO1s for each module would be part of the original study package which students could receive by tracked mail or collect in person.)

Supporting ways of communicating with students would include:

- Individual and bulk SMS messaging (for assignment deadline reminders etc.)
- Email and telephone numbers for core ACE team
- A programme internet chat room
- Radio announcements and discussions (where opportunity allows)
- Video- and teleconferencing (NUSA has at least one such facility in each province and introductory and concluding discussion lectures are envisaged by the core ACE team)
- Site visits (it is envisaged that one or more tutors in each province will be a retired school principal who will be contracted to visit each student at least twice during the course of each year of the programme to discuss the impact of the student's context on his/her work output for the programme and the impact of the student's work output on his/her school. Given the cluster nature of enrolment, it is believed that these 3-4 retiree tutors will be able to visit 2-3 students in a day and would therefore need to be contracted for an additional 150 days over and above their normal tutoring time of about 60 hours).

2.2 Optimising contact support

2.2.1 Planning contact sessions

Key questions

Where and when will contact sessions be offered?

What should happen during these contact sessions to make the best use of the time available, taking cognisance of the collaborative learning strategies advocated in the programme decision?

Who will run these contact sessions and how will they be identified, inducted, trained, monitored and supported through the programme delivery cycle?

Discussion

It is expected that about 120 hours of contact-based support (10% of NLH) will be offered to students over the two years of their part-time study.

Given that students are all already in full-time employment, these contact sessions will need to happen after school hours, over weekends or during school holidays (and here care needs to be taken about possible clashes with provincial training initiatives).

Experience suggests that students will be willing to attend contact sessions if the dates are known well in advance so that plans can be made and if the venue is easy for students to get to and from, especially those who are dependent on public transport. Students will also be willing to return to contact sessions if they find them useful. However, 100% attendance is unlikely, so it suggested that contact sessions should not be the only means of communicating and discussing 'new' information.

Contact session venues need not be state-of-the-art. Often a high school classroom is adequate provided the school and its classrooms are well-maintained. (Avoid using primary schools because the furniture is often too small for adults.)

It is important that tutors realise that they are working for the same national programme. They should not be introducing their own 'additional' materials and ideas during contact sessions but should rather be supporting and reinforcing the core programme materials and assessment tasks. Consideration will need to be given to the characteristics, skills and experiences of a 'suitable' tutor and plans made for recruitment, induction, monitoring and supporting of these local tutors.

How NUSA responded

NUSA discussed this issue with their provincial counterparts and it was agreed that as far as possible the 'tutors' on the programme would be drawn from circuit and district offices. The advantage of this

is that monitoring and support for the programme could be more effectively integrated into the routine work of provincial officials and there would be an added HRD dimension to the intervention. In exchange for their extra work, the Provincial authorities agreed that NUSA could pay the 'tutors' an honorarium for their services (per contact session and per script) and reimburse them for the cost of transport to and from centres and for their programme-related telephone expenses (a fixed amount).

In general, tutors needed to have qualifications at BEd Hons level or above with some specialisation in education leadership and management and practical experience in school leadership and management development. Previous tutoring experience would be seen as an added advantage. Tutors who have not successfully completed an Assessment module during their Honours studies will be expected to register for and complete ETDP Assessor training. Their involvement in the programme will be deferred until this training is successfully completed.

Two members of the core team would be responsible for orientating the provincial tutors, leading marking sessions and visiting centres at random during contact sessions for quality assurance and support purposes. Contact sessions would be expected to take the form of group and plenary discussion based on engagement with the course materials and reflective accounts of experience from the students. No lecturing of content was to be expected or desired.

It was further agreed that contact sessions would take place at a high school central to each grouping of school clusters as identified by the province. This would mean that if there was 100% attendance, each tutor would be working with 30-35 students in a classroom built to cater for 45 learners.

It was further agreed that tutors would offer 12 days (at about 5 hours per day) of contact per year, during school holidays organised as follows for the first year:

End January: 2 days

Welcome, introductions and formation of cluster-based study groups

Orientation to the programme

Orientation to the first semester modules and assignments

Orientation to the projects and portfolio

End February: 1 Saturday

Programme updates and general issues

Progress on projects and portfolio

Submission of first assignments

First school visits during February/March/April

April school holidays: 3 days

Programme updates and general issues

Progress on projects and portfolio

Findings of school visits and feedback on first assignments

Review of first semester modules and clarification of second assignments

Mid June: 1 Saturday

Programme updates and general issues

Progress on projects and portfolio

Submission of second assignments

July school holidays: 2 days

Programme updates and general issues

Progress on projects and portfolio

Feedback on second assignments

Consolidation of four initial modules

Orientation to second semester modules and assignments

Second school visits during July/August/September

Mid August: 1 Saturday

Programme updates and general issues

Progress on projects and portfolio

Submission of first assignments for 2nd semester modules

September school holidays: 1 day

Programme updates and general issues

Progress on projects and portfolio

Findings of school visits and feedback on first assignments

Review of 2nd semester modules and submission of second assignments

November: 1 Saturday

Programme updates and general issues

Progress on projects and portfolio

Feedback on second assignments

Consolidation of 2nd semester modules

Procedures for 2nd year registration.

2.2.3 Planning site-based support

Key questions

The focus of the ACE (School Leadership) is transformation of principalship and schools through site-based support, mentoring and assessment. Site-based work and assessment comprises 50% of the NLH assigned in the programme design.

Institutions will need to decide how site-based support and assessment will be managed. Will institutional staff be involved? Will school staff be involved? How will these people be identified, inducted, trained, monitored and supported? Will these staff need to be trained as assessors and verifiers?

Discussion

The overall objective of the ACE (SML) is transformation of both individuals and their schools. We have however noted the importance of context in this process. Some students may be working in schools where there is already a culture that is conducive to collegiality and change. Other students may be working in much more challenging circumstances and may therefore be able to effect less change through the course of their engagement with the programme. However, all assessment tasks are expected to be practice-based and will involve students trying to do things in their schools and engaging with other stakeholders in the process.

In addition, the students on this programme need to work, raise families and respond to a host of different commitments in addition to their workload for this programme and will only have formal opportunities to engage with institutional representatives for about 10% of the time.

The above factors indicate the need for some ongoing support and support that is not only student initiated.

One way to do this would be to identify a school-based mentor for each student in the programme.

Another strategy might be to bring in someone from outside for regular visits during the course of the programme.

The pros and cons, costs and logistics of these different strategies will need to be discussed.

There is also a possible tension between line management and mentoring roles and between assessor and mentoring roles that will need to be addressed.

How NUSA responded

*In principle, NUSA liked the idea of school-based mentors – in fact one of the modules in the ACE (SML) programme aims to promote this. However, identifying, inducting, training, monitoring and supporting school-based mentors in every school seemed a bit too much to organise and manage given the amount of time and resources that were available to the team. In discussing the issue, the NUSA programme team did decide, however, that when the programme was rolled out to **aspirant** principals that they would encourage enrolment in pairs (or even whole SMTs) to try to maximise the potential for collegial support and change within the school.*

For the field-test students, NUSA decided that they needed to contract one or more retired school principals or circuit/district managers who would visit students in their schools twice per year and would observe, motivate and mentor students in the execution of their practice-based assessment tasks. In order to ensure a full integration into the programme, these contract mentors would also tutor one of the groups. As a consequence, these contract mentors would be aware of the different challenges and trends emerging from students' engagement with the programme more generally and would be able to take this into account in their school support visits. It was further agreed that tutor orientation would include mentoring and moderation skills and discussions on the potential tensions between line management and assessment roles and mentoring roles.

It was further agreed to hold debriefing sessions with tutors and mentors in the middle and at the end of each year and to feed this discussion into improved planning for the subsequent year.

2.3 General learner support issues

2.3.1 Open learning and adult students

Key question

Students will spend only about 10% of their learning time in institutional contact sessions as they are already in full-time employment. In addition, the students are all adults and have many years of experience. This suggests that programme facilitators should be familiar with open learning, adult education and distance education principles. How will institutions provide for this need?

Discussion

The ACE (SML) is designed for working adults. It seeks to open access to further professional development for educators who are already in full time employment. The advantage of this is that these adults are enabled to work and study at the same time and are immediately able to try out the things they learn in practice. The disadvantage is that they need to try to engage with their studies over and above their work, family and social commitments. This means that for much of the time, the students are working at a distance from the institution. Although they are using learning resources that have been designed to facilitate independent learning, there will inevitably be concepts, tasks, challenges which they meet which could perhaps be more easily addressed in a more collaborative environment. HEIs will therefore need to think about how to address student support needs between the formal contact sessions. Communication is clearly critical here and the earlier discussion should have been useful in this regard.

However, there is also need to have a sound understanding of the context. Hence it will probably also be necessary to explore the notion of open learning and the associated contexts of distance education and resource-based learning, and then use this to develop a more informed understanding of the potential needs of the students on the ACE (SML) programme.

It should also be noted that if an HEI is intending to make use of local tutors/mentors, that these people might have limited experience in the education and training of adults.

How NUSA responded

NUSA decided to include in its tutor/mentor training pack some information on issues regarding the principles of open learning, distance education and adult learning and to include some discussion of the implications of these concepts for identifying and pro-actively seeking to address the potential learning needs of students regarding academic, informational and personal support and counselling.

The programme team also decided that students would need to be encouraged and supported in the formation and maintenance of study groups.

2.3.2 Planning, facilitating and evaluating networking contact sessions

Key question

How will institutions not only maximise the use of institutional contact sessions but also encourage the formation of student-led networking in school clusters etc.?

Discussion

Higher education generally in South Africa does not have a good track record of retaining and graduating students. Where students repeatedly fail assessments in large numbers this is often taken as an indication of underpreparedness of students and the maintenance of high standards, rather than leading to questions about the appropriateness of the assessment tasks and the adequacy of institutions' preparation of students for these tasks. We recognise that often students come into programmes with inadequate background knowledge and skills but we often neglect to adapt our fundamental modules/courses to try to address this need.

However, research suggests that we lose many students even before they submit assessment tasks, and this is particularly the case in part-time or distance education study. If students

do not feel supported in a continuous way, even a small problem may begin to feel like an insurmountable hurdle and they may lose motivation and drop out of the programme. This can in part be addressed by ensuring that contact sessions are spread throughout the year and that there is a continuous stream of communication through snailmail, SMS messaging and other forms of ongoing communication such as email and chatroom interaction.

However, one area that is often **not** exploited sufficiently is students' own knowledge and experience. After all, a programme like the ACE (SML) is targeted at working adults. If students are made to realise through the contact sessions that there is a lot that they can do to learn from and support one another, then there is a possibility that this kind of interaction will continue outside of the formal contact session. However, the formation and maintenance of an effective study group is not a simple thing and students will usually need some guidance in this area.

How NUSA responded

In the longer term, NUSA decided to focus its marketing and recruitment strategy at SMTs as a whole so that in the ideal situation no student would be working alone in any particular school. It was felt that the programme's main project might then be reoriented as a group rather than an individual assignment.

In the shorter term, the NUSA team decided to devote some time during the first contact session to identifying and forming geographically organised study groups and to support these groups by providing some guidelines in their programme tutorial letter M01.

In addition, it was decided that the formal contact sessions would involve a lot of group discussion of case studies, scenarios and experiences and open-ended responses and that students would be constantly encouraged to engage critically with the learning material and to provide additional and even alternative strategies to those suggested. It seemed clear to the team that their tutor training sessions would need to incorporate some discussion about facilitation methods. It was also decided that tutors should write a short report after the contact sessions that would summarise some of these discussions and experiences discussed so that they could be integrated into the revised materials.

2.3.3 The facilitator as a counsellor

Key question

Higher education generally is currently characterised by low retention and high drop-out figures. It is believed that one of the major causes for this is personal and/or family problems

which cause the student to lose motivation. How will institutional staff be equipped to play a motivating and/or counselling role? What additional support facilities will students have access to?

Discussion

Traditionally, teachers and tutors have seen their role as being mostly about dealing with the academic problems of students. However, there is an increasing awareness that students encounter non-academic problems which they may want to discuss with their facilitator. The kinds of issues that arise stem from the fact that these students are often trying to juggle family, career and study commitments and may range from inability to manage their time, or lack of an appropriate work space to traumatic events such as the death of a loved one.

Again, our first piece of advice here is for staff to listen. Often all that students need is a sounding board and an opportunity to vent their frustrations. We suggest that staff avoid making judgements or giving advice. Most staff are not trained counsellors or specialists in all the different areas that a student may be encountering problems with. If necessary, they should refer the student to someone who is qualified to help them – a social worker, a priest, a clinical psychologist etc.

However, there are some issues that from experience we know come up time and again and for which programme staff should be prepared to help. These are issues to do with students' doubts about their own abilities, their motivation to succeed and their ability to manage their time and workspace.

How NUSA responded

NUSA decided to devote a discussion to counselling as part of its tutor/mentor training (what had started out as a 2-day orientation was now shaping up as a 5-day workshop).

With regard to these issues, NUSA advised their tutors/mentors as follows:

- *deal sensitively with students' doubts and concerns and respond to problems that can be dealt with (course related) and refer them to specialists where you are not qualified to help;*
- *encourage and motivate students in all that you do – by providing constructive feedback, recognising good work and effort, actively using the students' own experiences, expertise and problems as the launch pads for discussion and keeping clear in everybody's minds the value of successfully completing the ACE programme;*
- *help students to organise their study space and time management (time spent on this at the beginning of the year can save a lot of wasted time later).*

One of the areas in which you can combine a motivating, academic and professional development agenda is in the way in which you give feedback on assessment.

2.3.4 Providing feedback on assessment

Key questions

Given the relatively limited direct contact with students, feedback on assessment will be a particularly critical aspect of the programme.

How will institutions communicate feedback to students?

What training/support will assessment staff receive in providing assessment feedback?

How will marking and assessment be standardised and monitored?

Discussion

The provision of feedback on assessment is a critical aspect of the outcomes-based nature of the ACE (SML) programme. It is vitally important at the beginning of the programme to review the learning outcomes and assessment standards that inform the unit standards that underpin each module of the ACE programme. It will be necessary to return to these often as the students work through the programme so that everybody is constantly informed by the purpose and intent of the qualification.

It is likely that each module will have assignments that need to be completed and submitted for assessment. It is important that these are discussed before students attempt them and again after they have attempted them. No students should have to 'guess' what the task requires or how it will be assessed. Given the limited nature of the face-to-face contact that HEIs will have with students, the written feedback that markers provide on their assignments becomes all that more critical.

Using the key assessment tasks as a teaching tool in this way can help to:

- consolidate learning
- check progress
- provide academic support
- motivate
- contribute to ongoing course development (if ALL the students have problems, perhaps the task itself is inappropriate or inadequately scaffolded).

Ideally, to ensure consistency of assessment across the programme, all assignments would be assessed through group marking strategies.

How NUSA responded

As noted previously, the NUSA team had already decided to design down in formulating their assessment tasks. The project tasks would be formulated first and would be structured in such a way as to elicit evidence of competence in line with the overall programme design. Then the team would interrogate the contribution that each module could make in enabling the integrated project task. Module-specific assignments would then be structured in such a way that they would address both the issues in the module and also build cumulatively the SKVAs needed to execute the project tasks.

Each assessment task would detail the assessment criteria and for each task students would be expected to complete a self-assessment and a peer-assessment (by another student) form. Tutors would then mark assignments in provincial marking groups under the leadership of two of the core NUSA programme team members. Where the tutor marking differed from the self- and peer-assessment, or where all three assessments resulted in a low achievement rating (2 or less), extensive feedback would need to be provided and the student would be given three weeks in which to re-submit.

The following guidelines were agreed overall:

- develop a system for giving feedback that is consistent across all the assessment tasks and easy to understand*
- make comments that demonstrate that you have read the assignment and are maintaining a dialogue with the student*
- make comments which indicate errors or simple misunderstandings of the course material with reference to the course material, so that students can check and make their own corrections*
- make comments about the relevance or approach used by the student*
- make comments which offer support and encouragement (even if the student is not doing well)*
- make comments on assignment-writing skills and integrate advice on study skills and strategies*
- make comments which explain the grade/mark/classification that they have been given*
- make a general comment at the beginning or end as well as specific comments next to relevant sections of the assignment itself*
- develop a system for correcting language errors.*

2.3.5 Monitoring student progress

Key questions

How will institutions monitor student progress?

In particular, how will at-risk students be identified early in the process and how will additional support for these students be mediated?

Discussion

There are a number of reasons for integrating assessment into our learning and teaching activities and these include providing us with feedback on the effectiveness of the programme and our own interventions and also helping us to monitor our students' progress.

There is no reason why all the students on the ACE (SML) programme should not be successful. However, some may take longer than others and some may need to make more than one attempt.

A lot of this monitoring will happen informally during networking contact sessions as tutors observe, listen to and engage with students' discussion of activities and problems. For this purpose it is a good idea to have a notebook to hand in which to jot down short reminders e.g. 'Thabo seems unsure about managing discipline'. 'Martha gave a good example of how she manages the school timetable'. After reflection, these comments could affect how staff engage with these students and the learning activities in future sessions.

Clearly we also need to keep track of who is submitting their assignments for assessment and how are they are doing and (re-)designing our interventions accordingly.

Monitoring student progress is an important part of the work of the tutor. Timeous submission of completed marksheets and comments on any emerging trends or problems can make the difference between a successful and an unsuccessful programme.

How NUSA responded

NUSA decided that deadlines would be set for all assessment tasks and communicated to students both in the programme tutorial letters and during the contact sessions. In addition, reminders of assignment deadlines (and contact session dates) would be sent out using bulk SMS messaging.

After each contact session, tutors would be expected to follow up telephonically on those students who did not attend.

After each marking session, tutors would be expected to follow up telephonically on those students who did not submit an assignment or who did particularly poorly and who needed to resubmit.

2.4 Concluding remarks

This brings us to the end of our current discussion on issues and questions regarding the implementation of the ACE (SML). As noted previously, the content here is neither exhaustive nor does it present all the answers to the challenges that HEIs will face. We hope, however, that there is sufficient here to help you begin your planning for a successful delivery of the ACE (SML).

Section 3: Assessment rubrics

This section provides suggested assessment rubrics for each of the modules that comprise the ACE (School Leadership) programme. You can cross refer with the course outline which has been supplied as a separate document.

3.1 Analytic Rubric for assessing Develop a portfolio to demonstrate school management and leadership competence (Fundamental)

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
<p>Critical Thinking</p> <p>This entails being aware of one's thinking as you perform tasks and using that awareness to monitor and direct what you are doing. It involves making critical choices concerning what to believe or what to do. This also refers to such basic mental tasks as comparing, classifying, predicting, problem solving and decision making that involves a variable but predictable sequence of thinking skills underpinned by constant critique of "what is".</p>	<ul style="list-style-type: none"> ✓ Demonstrates little understanding and only limited comprehension of scope of problem or issues. ✓ Employs only the most basic parts of information provided. ✓ Mixes fact and opinion in developing a viewpoint. ✓ States conclusion after hasty or cursory look at only one or two pieces of information ✓ Does not consider consequences. 	<ul style="list-style-type: none"> ✓ Demonstrates only a very general understanding of scope of problem ✓ Focuses on a single issue ✓ Employs only the information provided ✓ May include opinion as well as fact in developing a position ✓ States conclusion after limited examination of evidence with little concern for consequences. 	<ul style="list-style-type: none"> ✓ Demonstrates a general understanding of scope of problem and more than one of the issues involved ✓ Employs the main points of information from the documents and at least one general idea from personal knowledge to develop a position ✓ Builds conclusion on examination of information and some considerations of consequences. 	<ul style="list-style-type: none"> ✓ Demonstrates clear understanding of scope of problem and at least two central issues ✓ Uses the main points of information from the documents and personal knowledge that is relevant and consistent in developing a position ✓ Builds conclusion on examination of the major evidence ✓ Considers at least one alternative action and the possible consequences. 	<ul style="list-style-type: none"> ✓ Demonstrates a clear, accurate understanding of the scope of the problem and the ramifications of the issues involved. ✓ Employs all information from the documents and extensive personal knowledge that is factually relevant, accurate and consistent in the development of a position. ✓ Bases conclusion on a thorough examination of the evidence, and exploration of reasonable alternatives, and an evaluation of consequences.
Communication of	✓ Position is vague	✓ Presents general and	✓ Takes a definite but	✓ Takes a clear position	✓ Takes a strong, well-

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
<p>ideas</p> <p>This describes how effectively the learner can communicate (represent using any of a variety of media) his or her solution and the thinking and processes behind it.</p>	<ul style="list-style-type: none"> ✓ Presentation is brief and includes unrelated general statements ✓ Overall view of their development is not clear ✓ Statements tend to wander or ramble. 	<p>indefinite position.</p> <ul style="list-style-type: none"> ✓ Only minimal organisation in presentation ✓ Uses generalities to support position ✓ Emphasises only one issue ✓ Considers only one aspect of their development. 	<p>general position</p> <ul style="list-style-type: none"> ✓ Presents a somewhat organised argument ✓ Uses general terms with limited evidence that may not be totally accurate ✓ Deals with a limited number issues ✓ Views their development within a somewhat limited range. 	<ul style="list-style-type: none"> ✓ Presents an organised argument with perhaps only minor errors in the supporting evidence ✓ Deals with the major issues and shows some understanding of relationships ✓ Gives consideration to examination of more than one aspect of the their development. 	<p>defined position</p> <ul style="list-style-type: none"> ✓ Presents a well-organised, persuasive argument with accurate supporting evidence ✓ Deals with all significant issues and demonstrates a depth of understanding of important relationships ✓ Examines their development from several positions.
<p>Knowledge of Portfolio Development</p> <p>This describes the extent to which the learner has sufficient knowledge and the ability to find appropriate information.</p>	<ul style="list-style-type: none"> ✓ Reiterates one or two facts without complete accuracy ✓ Deals only briefly and vaguely with concepts or the issues concerning demonstrating understanding of the portfolio as a flexible assessment instrument in SA ✓ Barely indicates any previous IQMS knowledge ✓ Relies heavily on the information provided. 	<ul style="list-style-type: none"> ✓ Provides only basic facts with only some degree of accuracy ✓ Refers to information to explain at least one issue or concept concerning the portfolio as a flexible assessment instrument in SA in general terms ✓ Limited use of previous IQMS knowledge without complete accuracy. ✓ Major reliance on the information provided. 	<ul style="list-style-type: none"> ✓ Relates only major facts to the basic issues with a fair degree of accuracy ✓ Analyses information to explain at least one issue or concept concerning the portfolio as a flexible assessment instrument in SA with substantive support ✓ Uses general ideas from previous IQMS knowledge with fair degree of accuracy. 	<ul style="list-style-type: none"> ✓ Offers accurate analysis of the documents ✓ Provides facts to relate to the major issues involved in demonstrating understanding of the portfolio as a flexible assessment instrument in SA ✓ Uses previous general IQMS knowledge to examine issues involved. 	<ul style="list-style-type: none"> ✓ Offers accurate analysis of the information and issues. ✓ Provides a variety of facts to explore major and minor issues and concepts involved in demonstrating understanding of the portfolio as a flexible assessment instrument in SA ✓ Extensively uses previous IQMS knowledge to provide an in depth

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
					understanding of the developmental appraisal strategy and to relate it to past and possible future situations.
<p>Observation</p> <p>This describes the extent to which the learner identifies something as a problem and becomes engaged in solving it.</p>	<ul style="list-style-type: none"> ✓ Observational procedures and reporting do not follow prescribed method. ✓ One inference/conclusion is reported and supported by data. ✓ Recording of observational reflections have been largely ignore ✓ Portfolios are undeveloped and unorganised. 	<ul style="list-style-type: none"> ✓ Observational procedures and reporting show some evidence that prescribed method was followed. ✓ Some of the reported inferences/conclusions are supported by data. ✓ The learner seems unsure about what to look for. ✓ Includes minimal, if any, reflections ✓ Does not develop or organise their portfolios completely ✓ Presents incomplete information with few or no supporting details. 	<ul style="list-style-type: none"> ✓ Most observational procedures and reporting show evidence that prescribed method was followed. ✓ About half of the inferences/conclusions reported are supported by data. ✓ Includes general reflections. ✓ Develops and organises their observations in a basic way. ✓ Presents sufficient information supported by basic details. 	<ul style="list-style-type: none"> ✓ Almost all observational procedures and reporting show evidence that prescribed method was followed. ✓ Most of the inferences/conclusions reported are supported by data. ✓ Includes reflections that are specific and generally relevant. ✓ Develops and organises their observations in a generally focused and complete manner. ✓ Presents complete information supported by basic details. 	<ul style="list-style-type: none"> ✓ All observational procedures and reporting show evidence that prescribed method was followed ✓ Observational criticism is clearly stated and is based on supportive examples. ✓ Observations are insightful and based on careful analysis and observation. ✓ Includes reflections on that are specific (who, what, where, when, why, how) and consistently relevant. ✓ Develops and organises their observations in a clearly focused, complete and creative manner. ✓ Presents complete

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
					information that is enhanced by precise and appropriate details.
<p>Reflection</p> <p>This refers to any reflexive thinking i.e. thinking before, during and after any process/ performance/ product / presentation.</p>	<ul style="list-style-type: none"> ✓ Self-reflective statements, if present, add little to clarify organization or explain learning achievements. ✓ Simply a container of work or assessments, without an attempt on the part of the learner to provide organization. ✓ There is no attempt by the learner to make a coherent statement about what learning has taken place. ✓ The learner’s understanding of the task is minimal ✓ The portfolio is about "collecting what the assessor asks for." 	<ul style="list-style-type: none"> ✓ Includes minimal, reflections on learning achievements ✓ At this point in the development of the portfolio there is insufficient information or organization to characterize the portfolio as either a story of learning or a portrait of the learner as manager leader. ✓ Learners may not be able to verbalize the reasons, even as they reflect on their choices, but the reviewer may be able to recognize a relationship between some exhibits or infer the reasons. ✓ For the learner, the portfolio was built by following instructions. 	<ul style="list-style-type: none"> ✓ Includes general reflections on learning achievements. ✓ In the process of becoming a story of the learner as a manager and leader. ✓ There is evidence of ownership as the learner displays a personal investment in selecting and explaining the content. ✓ There is a sense of intentionality controlling some of the learner’s choices. ✓ It is possible to distinguish other stakeholders' goals from the learner’s or to recognize instances when they overlap. ✓ The portfolio may be 	<ul style="list-style-type: none"> ✓ Includes reflections on learning achievements that are specific and generally relevant. ✓ The learner’s authorial voice is always present. ✓ Tells a coherent story of the learner as a reflective manager and leader ✓ There are relationships between one part of the portfolio and another. ✓ There is an awareness of the perspectives of other stakeholders and the learner’s self-assessment has been enhanced by this knowledge. ✓ Evidence of self- 	<ul style="list-style-type: none"> ✓ Includes reflections on learning achievement that are specific (who, what, where, when, why, how) and consistently relevant. ✓ When reviewing the portfolio, outsiders get the feeling they really know the person whose achievement is depicted there, and have a fair understanding of how the learning came about. ✓ All the parts of the portfolio bear a clear relationship to each other and to a central purpose. ✓ A reviewer can look at the portfolio and easily understand how the judgments about

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
		<ul style="list-style-type: none"> ✓ There may be evidence that the learner had some insight into the assessor’s purposes. 	<p>created for others to assess, but there is also evidence of self-assessment.</p>	<p>reflection adds information to the presentation,</p>	<p>the learner came to be made and the degree to which different stakeholders would agree.</p>
<p>Application</p> <p>This describes the extent to which the learner knows and uses appropriate problem solving strategies.</p>	<ul style="list-style-type: none"> ✓ No evidence of planning personal and organizational growth <p>OR</p> <ul style="list-style-type: none"> ✓ Evidence of a very limited ability to plan personal and organizational growth ✓ Evidence of a very limited ability to record observations, experiences, ideas, information and insights that are relevant to the task. ✓ Little evidence of the needed techniques (CV’s, SWOT Analysis, historical content, self-reflective diary, samples of course activities, interviews, observations, reports and situation analysis) for ensuring effective 	<ul style="list-style-type: none"> ✓ Does not develop or organise a personal and organizational growth plan completely ✓ Presents incomplete information with few or no supporting details ✓ Evidence of a basic ability to record some of the following: observations, experiences, ideas, information and insights that are relevant to the task. ✓ The learner includes a few needed techniques (CV’s, SWOT Analysis, historical content, self-reflective diary, samples of course activities, interviews, observations, reports 	<ul style="list-style-type: none"> ✓ Develops and organises a simple personal and organizational growth plan in a basic way. ✓ Evidence of a competent ability to record observations, experiences, ideas, information and insights that are relevant to the task. ✓ The learner includes many of the needed techniques (CV’s, SWOT Analysis, historical content, self-reflective diary, samples of course activities, interviews, observations, reports and situation analysis) for ensuring effective development of a portfolio to reflect own management. 	<ul style="list-style-type: none"> ✓ Develops and organises the development of a personal and organizational growth plan in a generally focused and complete manner. ✓ Evidence of a confident ability to record observations, experiences, ideas, information and insights that are relevant to the task. ✓ The learner includes most of the needed techniques (CV’s, SWOT Analysis, historical content, self-reflective diary, samples of course activities, interviews, observations, reports and situation analysis) for ensuring effective 	<ul style="list-style-type: none"> ✓ Develops and organises the development of a personal and organizational growth plan in a clearly focused, complete and creative manner ✓ Evidence of innovative choices and divergent approaches, and an outstanding ability to record observations, experiences, ideas, information and insights that are relevant to the task. ✓ The learner includes a wealth of the needed techniques (CV’s, SWOT Analysis, historical content, self-reflective diary, samples of course activities, interviews,

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
	<p>development of a portfolio to reflect own management.</p> <ul style="list-style-type: none"> ✓ Writing is not original; copies the ideas of others <p>OR</p> <ul style="list-style-type: none"> ✓ Writing contains so many errors in language use that make reading difficult to understand ✓ Minimally completes the task with fragmented results- may need redirection in the future. 	<p>and situation analysis) for ensuring effective development of a portfolio to reflect own management.</p> <ul style="list-style-type: none"> ✓ Shows little or no awareness or the audience ✓ Ideas are presented in a disorganized way ✓ Work lacks accuracy and completeness; appearance interferes with communication of ideas ✓ Partially completes the task with minimal or perfunctory effort. 	<ul style="list-style-type: none"> ✓ Work is accurate, neat, and complete ✓ Ideas have been organized ✓ Writing contains few language errors; ideas are not difficult to understand ✓ Substantially completes the task, with some ideas or concepts missing. 	<p>development of a portfolio to reflect own management.</p> <ul style="list-style-type: none"> ✓ Effectively presents self and ideas to outside reviewer ✓ Writing is original ✓ Writing is clear and organized ✓ Work is accurate and complete; appearance helps the communication of ideas ✓ Completes the task in an incisive and thorough manner. 	<p>observations, reports and situation analysis) for ensuring effective development of a portfolio to reflect own management.</p> <ul style="list-style-type: none"> ✓ Self and ideas "come alive" to outside reviewer ✓ Writing is original and may be creative ✓ Writing is clear and well-organized throughout portfolio ✓ Writing is almost free of language errors and is easy to understand ✓ Makes fulfilment of the task a creative expression.



3.2 Analytic Rubric for assessing Lead and manage effective use of ICTs in schools (Fundamental)

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
<p>Critical Thinking</p> <p>This entails being aware of one's thinking as you perform tasks and using that awareness to monitor and direct what you are doing. It involves making critical choices concerning what to believe or what to do. This also refers to such basic mental tasks as comparing, classifying, predicting, problem solving and decision making that involves a variable but predictable sequence of thinking skills underpinned by constant critique of "what is".</p>	<ul style="list-style-type: none"> ✓ Demonstrates little understanding and only limited comprehension of scope of problem or issues with respect to the potential and use of ICT for both management and curriculum support. ✓ Employs only the most basic parts of information provided. ✓ Mixes fact and opinion in developing a viewpoint. ✓ States conclusion after hasty or cursory look at only one or two pieces of information. ✓ Does not consider consequences. 	<ul style="list-style-type: none"> ✓ Demonstrates only a very general understanding of scope of problem or issues with respect to the potential and use of ICT for both management and curriculum support ✓ Focuses on a single issue ✓ Employs only the information provided ✓ May include opinion as well as fact in developing a position ✓ States conclusion after limited examination of evidence with little concern for consequences. 	<ul style="list-style-type: none"> ✓ Demonstrates a general understanding of scope of problem and more than one of the issues involved with respect to the potential and use of ICT for both management and curriculum support ✓ Employs the main points of information from the documents and at least one general idea from personal knowledge to develop a position ✓ Builds conclusion on examination of information and some considerations of consequences. 	<ul style="list-style-type: none"> ✓ Demonstrates clear understanding of scope of problem and at least two central issues with respect to the potential and use of ICT for both management and curriculum support ✓ Uses the main points of information from the documents and personal knowledge that is relevant and consistent in developing a position ✓ Builds conclusion on examination of the major evidence ✓ Considers at least one alternative action and the possible consequences. 	<ul style="list-style-type: none"> ✓ Demonstrates a clear, accurate understanding of the scope of the problem and the ramifications of the issues involved. ✓ Employs all information from the documents and extensive personal knowledge that is factually relevant, accurate and consistent in the development of a position. ✓ Bases conclusion on a thorough examination of the evidence, and exploration of reasonable alternatives, and an evaluation of consequences.
<p>Communication of</p>	<ul style="list-style-type: none"> ✓ Position is vague ✓ Presentation is brief 	<ul style="list-style-type: none"> ✓ Presents general and indefinite position. 	<ul style="list-style-type: none"> ✓ Takes a definite but general position 	<ul style="list-style-type: none"> ✓ Takes a clear position ✓ Presents an organised 	<ul style="list-style-type: none"> ✓ Takes a strong, well-defined position

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
<p>ideas</p> <p>This describes how effectively the learner can communicate (represent using any of a variety of media) his or her solution and the thinking and processes behind it.</p>	<p>and includes unrelated general statements</p> <ul style="list-style-type: none"> ✓ Overall view of their development is not clear ✓ Statements tend to wander or ramble. 	<ul style="list-style-type: none"> ✓ Only minimal organisation in presentation ✓ Uses generalities to support position ✓ Emphasises only one issue ✓ Considers only one aspect of their development. 	<ul style="list-style-type: none"> ✓ Presents a somewhat organised argument ✓ Uses general terms with limited evidence that may not be totally accurate ✓ Deals with a limited number issues ✓ Views their development within a somewhat limited range. 	<p>argument with perhaps only minor errors in the supporting evidence</p> <ul style="list-style-type: none"> ✓ Deals with the major issues and shows some understanding of relationships ✓ Gives consideration to examination of more than one aspect of the their development. 	<ul style="list-style-type: none"> ✓ Presents a well-organised, persuasive argument with accurate supporting evidence ✓ Deals with all significant issues and demonstrates a depth of understanding of important relationships ✓ Examines their development from several positions.
<p>Knowledge of the effective use of computer skills</p> <p>This describes the extent to which the learner has sufficient knowledge and the ability to find appropriate information.</p>	<ul style="list-style-type: none"> ✓ Barely indicates any skill in using a computer for management or curriculum tasks ✓ Reiterates one or two facts without complete accuracy ✓ Deals only briefly and vaguely with concepts or the issues concerning demonstrating understanding of what computers in the school can be used for ✓ Relies heavily on the information provided. 	<ul style="list-style-type: none"> ✓ Limited ability in using a computer for management or curriculum tasks ✓ Provides only basic facts with only some degree of accuracy ✓ Refers to information to explain at least one issue or concept concerning what computers in the school can be used for ✓ Major reliance on the information provided 	<ul style="list-style-type: none"> ✓ Uses a computer for basic management and curriculum tasks with a fair degree of accuracy ✓ Relates only major facts to the basic issues with a fair degree of accuracy ✓ Analyses information to explain at least one issue or concept concerning what computers in the school can be used for 	<ul style="list-style-type: none"> ✓ Uses a computer for daily management and curriculum tasks ✓ Offers accurate analysis of arguments relating to computer use and the relative merits of different applications and software ✓ Provides facts to relate to the major issues involved in demonstrating what computers in the school can best be used for. 	<ul style="list-style-type: none"> ✓ Extensively uses computer skills to provide an in depth understanding of the implications concerning the school and to relate it to past and possible future situations. Offers accurate analysis of the information and issues. ✓ Provides a variety of facts to explore major and minor issues and concepts involved in making the best use of computer facilities in

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
					the school.
Observation	<ul style="list-style-type: none"> ✓ No analytical ability even on a descriptive level ✓ Not able to break down information ✓ Cannot relate theory to practice even with considerable assistance ✓ No research was done ✓ Uses repetition instead of compelling argumentation ✓ Position taken is continually shifting ✓ Does not support statements or arguments with reference material ✓ Easy to refute ✓ Reluctant to make use of a computer for even basic tasks. 	<ul style="list-style-type: none"> ✓ Able to analyse but mostly descriptive ✓ Limited ability to break down information – focuses on a single pro or con ✓ Needs assistance sometimes to relate theory to practice ✓ Inadequate research ✓ Generally illogical arguments put forward ✓ Relies on common sense rather than referring to support material. ✓ Position taken is unclear ✓ Hesitant to make use of a computer for even basic tasks and makes frequent errors. 	<ul style="list-style-type: none"> ✓ Appropriate analytical ability though vague in places ✓ Analysis slightly more descriptive than critical and refers only generally to pro’s and con’s ✓ Able to relate theory to practice but with no additional comments. ✓ Some evidence of research ✓ Evidence of a mixture of rational and muddled thinking. ✓ Very little supportive material used ✓ Unsure of position sometimes. ✓ Fact/opinion sometimes overlap ✓ Willing and able to make use of a computer for routine tasks and makes few errors. 	<ul style="list-style-type: none"> ✓ Able to analyse accurately ✓ Thoughtful, critical analysis and interpretation – identifies relevant pro’s and con’s ✓ Relates theory to practice with some additional comments. ✓ Sufficient evidence of research ✓ Thoughtfully supported opinions ✓ Supportive material used to back up arguments ✓ Reasoning is logical and clear ✓ A basic position is taken. ✓ Few surprises. ✓ Fact/opinion distinguished ✓ Willing and able to make use of a computer for routine and novel or complex tasks and makes few errors ✓ Demonstrates a 	<ul style="list-style-type: none"> ✓ Remarkable ability to analyse – identifies the salient pro’s and con’s. ✓ Excellent critical analysis ability – able to recognise a process over time. ✓ Excellent ability to relate theory to practice correctly with additional comments. ✓ Impressive use of source material. ✓ Digs for the truth ✓ Logical, convincing and compelling arguments put forward ✓ Presents complete information that is enhanced by precise and appropriate details ✓ Thought provoking, interesting material used to support opinions ✓ Employs sound reasoning.

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
				commitment to maximising the effective use of computer technology in the school.	<ul style="list-style-type: none"> ✓ Position is clear ✓ Willing and able to make use of a computer for routine and novel or complex tasks and rarely makes errors ✓ Demonstrates a commitment to maximising the effective use of computer technology in the school.
<p>Reflection</p> <p>This refers to any reflexive thinking i.e. thinking before, during and after any process/ performance/ product / presentation.</p>	<ul style="list-style-type: none"> ✓ Exhibits close-mindedness or hostility to reason. ✓ Argues using fallacious or irrelevant reasons and makes unwarranted claims ✓ Vague, simple, mechanical reflections on improving the effectiveness of the school's policies and plans ✓ Focuses mainly on surface features ✓ No examples provided, purposeless ✓ One-dimensional, superficial reflections 	<ul style="list-style-type: none"> ✓ Regardless of the evidence or reasons, maintains or defends views based on self-interest or preconceptions. ✓ Considers only one aspect ✓ Two-dimensional reflections provided i.e describes the existing policies with some specifics but includes no insights into how to go about implementing them ✓ Focuses on only a few aspects ✓ They have described 	<ul style="list-style-type: none"> ✓ Ignores or superficially evaluates obvious alternative points of view. ✓ Draws warranted, non-fallacious conclusions ✓ Although the learner seems to want to optimise the understanding of policy they are not able to define or clarify the problem areas. This may be due to a seeming reluctance to adopt an attitude of a lifelong learner. 	<ul style="list-style-type: none"> ✓ Thoughtfully analyses and evaluates obvious alternative points of view. ✓ Draws judicious conclusions – good reasoning ability ✓ An interest is shown towards optimising the school's policies and plans through adopting an attitude of listening, careful observation, asking questions, requesting clarification of pertinent ideas, and consultation with others as necessary 	<ul style="list-style-type: none"> ✓ Thoughtfully analyses and evaluates major alternative points of view. ✓ Fair-mindedly follows where evidence and reasons lead. ✓ The learner is highly motivated and in depth reflexive thinking is applied concerning the optimisation of school usage of ICTs ✓ Analysis of strengths and weaknesses have depth to them and reflections on debate results that are specific

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
	<p>provided (e.g. I like..../I don't like....)</p> <ul style="list-style-type: none"> ✓ The learner's understanding of ICT potential is minimal ✓ Hard to read, not organized well. 	<p>individual thoughts, feelings concerning the impact of policy of the management of schools but made no comparisons between the various views on it</p> <ul style="list-style-type: none"> ✓ There may be evidence that the learner had some insight into the potential of ICT but some inferences need to be made as to what the learner means. 	<ul style="list-style-type: none"> ✓ Reflects on the school community views on ICT usage and potential in a general way ✓ Able to identify strengths and weaknesses. 	<ul style="list-style-type: none"> ✓ Feelings are shared as well as both strengths and weaknesses of the use and potential for integrating ICTs into school and curriculum management ✓ Includes reflections on debate results that are mostly specific (who, what, where, when, how, why) and penetrating. 	<p>(who, what, where, when, how, why) and consistently insightful.</p>
<p>Application</p> <p>This describes the extent to which the learner knows and uses appropriate problem solving strategies.</p>	<ul style="list-style-type: none"> ✓ Very little use made of a computer and little evidence of a commitment to developing and sharing computer skills. 	<ul style="list-style-type: none"> ✓ An attempt has been made to use a computer to simplify or improve one or two routine tasks but little evidence of a committed process or of the sharing of computer skills. 	<ul style="list-style-type: none"> ✓ A computer is being used to better manage several routine management tasks such as writing of formal letters, reports, memos, agendas, minutes etc. ✓ Other staff have been equipped with skills to handle some of these tasks. 	<ul style="list-style-type: none"> ✓ One or more computers are being used by one or more people for a variety of routine and innovative school and curriculum management activities including the use of email and internet where available ✓ Computer technology has been integrated into routine problem-solving. 	<ul style="list-style-type: none"> ✓ Optimal use is being made of the computer facilities available by several staff members for a variety of routine and innovative school and curriculum management activities including the use of email and internet where available ✓ Computer technology has been integrated into everyday problem-solving.

3.3 Analytic Rubric for assessing Understand school leadership and management in the South African context (Core)

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
<p>Critical Thinking</p> <p>This entails being aware of one's thinking as you perform tasks and using that awareness to monitor and direct what you are doing. It involves making critical choices concerning what to believe or what to do. This also refers to such basic mental tasks as comparing, classifying, predicting, problem solving and decision making that involves a variable but predictable sequence of thinking skills underpinned by constant critique of "what is"</p>	<ul style="list-style-type: none"> ✓ Demonstrates little understanding and only limited comprehension of scope of problem or issues. ✓ Employs only the most basic parts of information provided. ✓ Mixes fact and opinion in developing a viewpoint. ✓ States conclusion after hasty or cursory look at only one or two pieces of information ✓ Does not consider consequences 	<ul style="list-style-type: none"> ✓ Demonstrates only a very general understanding of scope of problem ✓ Focuses on a single issue ✓ Employs only the information provided ✓ May include opinion as well as fact in developing a position ✓ States conclusion after limited examination of evidence with little concern for consequences. 	<ul style="list-style-type: none"> ✓ Demonstrates a general understanding of scope of problem and more than one of the issues involved ✓ Employs the main points of information from the documents and at least one general idea from personal knowledge to develop a position ✓ Builds conclusion on examination of information and some considerations of consequences. 	<ul style="list-style-type: none"> ✓ Demonstrates clear understanding of scope of problem and at least two central issues ✓ Uses the main points of information from the documents and personal knowledge that is relevant and consistent in developing a position ✓ Builds conclusion on examination of the major evidence ✓ Considers at least one alternative action and the possible consequences 	<ul style="list-style-type: none"> ✓ Demonstrates a clear, accurate understanding of the scope of the problem and the ramifications of the issues involved. ✓ Employs all information from the documents and extensive personal knowledge that is factually relevant, accurate and consistent in the development of a position. ✓ Bases conclusion on a thorough examination of the evidence, and exploration of reasonable alternatives, and an evaluation of consequences.

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
<p>Communication of ideas</p> <p>This describes how effectively the learner can communicate (represent using any of a variety of media) his or her solution and the thinking and processes behind it.</p>	<ul style="list-style-type: none"> ✓ Position is vague ✓ Presentation is brief and includes unrelated general statements ✓ Overall view of the problem is not clear ✓ Statements tend to wander or ramble. 	<ul style="list-style-type: none"> ✓ Presents general and indefinite position. ✓ Only minimal organisation in presentation ✓ Uses generalities to support position ✓ Emphasises only one issue ✓ Considers only one aspect of problem 	<ul style="list-style-type: none"> ✓ Takes a definite but general position ✓ Presents a somewhat organised argument ✓ Uses general terms with limited evidence that may not be totally accurate ✓ Deals with a limited number issues ✓ Views problem within a somewhat limited range 	<ul style="list-style-type: none"> ✓ Takes a clear position ✓ Presents an organised argument with perhaps only minor errors in the supporting evidence ✓ Deals with the major issues and shows some understanding of relationships ✓ Gives consideration to examination of more than one idea or aspect of the problem 	<ul style="list-style-type: none"> ✓ Takes a strong, well-defined position ✓ Presents a well-organised, persuasive argument with accurate supporting evidence ✓ Deals with all significant issues and demonstrates a depth of understanding of important relationships ✓ Examines the problem from several positions
<p>Knowledge and use of leadership and management</p> <p>This describes the extent to which the learner has sufficient knowledge and the ability to find appropriate information.</p>	<ul style="list-style-type: none"> ✓ Reiterates one or two facts without complete accuracy ✓ Deals only briefly and vaguely with the principles and values informing educational transformation in South Africa ✓ Barely indicates any previous knowledge of what is involved in school management and leadership in South Africa 	<ul style="list-style-type: none"> ✓ Provides only basic facts with only some degree of accuracy ✓ Refers to information to explain transformational values or principles without complete accuracy. ✓ Limited understanding of the nature and purpose of educational management, leadership and 	<ul style="list-style-type: none"> ✓ Relates only major facts to the basic issues with a fair degree of accuracy ✓ Analyses information to explain the values and principles informing educational transformation in South Africa with substantive support ✓ Uses general ideas of the nature and purpose of educational 	<ul style="list-style-type: none"> ✓ Offers accurate analysis of the documents ✓ Provides facts to relate to the major issues involved in educational transformation in South Africa ✓ Uses previous knowledge of the nature and purpose of educational management leadership and 	<ul style="list-style-type: none"> ✓ Offers accurate analysis of the information and issues. ✓ Provides a variety of facts to explore major and minor issues concerning the principles and values informing educational transformation in South Africa ✓ Extensively uses their understanding of the nature and purpose of

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
	<ul style="list-style-type: none"> ✓ Relies heavily on the information provided. 	<ul style="list-style-type: none"> governance ✓ Major reliance on the information provided 	<ul style="list-style-type: none"> management leadership and governance with fair degree of accuracy 	<ul style="list-style-type: none"> governance to examine issues involved 	<ul style="list-style-type: none"> educational management, leadership and governance to provide an in depth understanding of the problem and to relate it to past and possible future situations.
<p>Observation</p> <p>This describes the extent to which the learner identifies something as a problem and becomes engaged in solving it.</p>	<ul style="list-style-type: none"> ✓ Minimally completes the task with fragmented results-may need redirection in the future. ✓ Use of analysis, interpretation, and critical judgment may be evident, but not clearly exhibited. ✓ Insufficient and /or irrelevant references are made to transformative and contextualised management, leadership and governance practices. ✓ The observer does not make their opinion regarding the situation / setup clear, or their opinions are not based on events that can 	<ul style="list-style-type: none"> ✓ Partially completes the task with minimal or perfunctory effort. ✓ There is an attempt to include analysis interpretation, and critical judgment in the observation. ✓ References to transformative and contextualised management, leadership and governance practices may be included, but the connection to the situation / setup being observed may not be clear. ✓ The learner seems unsure about what to look for. ✓ There is an attempt to describe the situation 	<ul style="list-style-type: none"> ✓ Substantially completes the task, with some ideas or concepts missing. The review includes analysis interpretation, and critical judgment. ✓ At least one reference is made to transformative and contextualised management, leadership and governance practices ✓ The observer's opinion is stated, and the reader gains a basic understanding of the situation / setup being observed. 	<ul style="list-style-type: none"> ✓ Completes the task in an incisive and thorough manner. ✓ Observation exhibits skill in critical analysis, interpretation, and judgment. ✓ References are made to transformative and contextualised management, leadership and governance practices ✓ Critical judgments are clear and reader gains an insight into the situation / setup being observed. 	<ul style="list-style-type: none"> ✓ Makes fulfilment of the task a creative expression. ✓ Observation reflects excellent application of skills in critical analysis, interpretation, and judgment. ✓ Reflects extensive use and understanding of transformative and contextualised understanding of management, leadership and governance ✓ The learner listens and observes carefully, poses insightful questions, requests clarifications of pertinent ideas, and consults with others as

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
	<p>back them up.</p> <ul style="list-style-type: none"> ✓ It is difficult for the reader to gain an idea of what the situation or setup is like. 	<p>or setup being observed, but the reader may not gain a clear picture.</p>			<p>necessary.</p> <ul style="list-style-type: none"> ✓ Observational criticism is clearly stated and is based on supportive examples. ✓ The reader gains a clear picture of the situation /setup and an understanding of the observer’s point of view.
<p>Reflection</p> <p>This refers to any reflexive thinking i.e. thinking before, during and after any process/ performance/ product / presentation</p>	<ul style="list-style-type: none"> ✓ Vague, simple, mechanical reflections ✓ Focuses mainly on surface features ✓ No examples provided, purposeless ✓ One-dimensional, superficial reflections provided (e.g. I like..../I don't like....) ✓ Does not seem to be aware of the need to set goals in improving own management and leadership practices. ✓ Doesn't seem honest or is not accurate when reflecting on events that have transpired ✓ There seems to be no ownership of 	<ul style="list-style-type: none"> ✓ Beginning to display an attitude of ownership towards improving own leadership and management practices ✓ Two-dimensional reflections provided (e.g. describes performance with some specifics but includes no insights or comparisons) ✓ Focuses on only a few aspects ✓ Reflects on leadership or management practice but not both ✓ They have described individual thoughts, feelings concerning performances, 	<ul style="list-style-type: none"> ✓ Although the learner seems to want to improve their own management and leadership practices, they may have some difficulty in defining or clarifying the problem areas. ✓ Able to identify strengths and weaknesses ✓ Demonstrates an awareness of the need to set goals in improving own management and leadership practices. ✓ Reflects on evaluation results in a general way 	<ul style="list-style-type: none"> ✓ An interest is shown towards accepting the challenges surrounding own current school management and leadership practices ✓ Feelings are shared as well as both strengths and weaknesses ✓ Able to set appropriate and achievable goals as a result of in-depth reflection ✓ Includes reflections and diagnostic strategies on evaluation results that are mostly specific (who, what, where, when, how, why) and 	<ul style="list-style-type: none"> ✓ The learner is highly motivated ✓ Sets goals for the future ✓ Problems surrounding own current school management and leadership practices are actively and thoughtfully approached ✓ Reflects on more than one thing - what needs to be done (content) as well as the best way to get there (process) ✓ Analysis of strengths and weaknesses have depth to them and diagnostic strategies on evaluation results that are specific (who,

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
	leadership or management abilities ✓ Hard to read, not organized well	processes, etc. but made no comparisons over time indicating progress, ✓ Some inferences need to be made as to what the learner means		penetrating	what, where, when, how, why) and consistently insightful
Application This describes the extent to which the learner knows and uses appropriate problem solving strategies	✓ Strategy is impractical or unworkable ✓ The learner does not always know when he or she is going wrong. ✓ When stuck – that is, if the strategy used does not help, the learner gives up. ✓ Reflective practice is not employed and when alternative strategies are suggested, the learner may be resistant or unable to change strategies.	✓ Strategy inferred (some evidence) but tactics are generally not well thought through and may be impractical in many instances OR ✓ The learner may know an appropriate strategy, but may be uncertain about how to apply it to the problem. ✓ He or she may try a number of strategies, but may not be able to explain why any one was selected. ✓ The learner may ignore the use of	✓ Develops a simple yet appropriate strategy but tactics used to achieve this are not always clear ✓ The learner may show evidence of gaps in the factual knowledge needed to solve the problem or have too narrow a focus. ✓ Fails to provide suggestions for improvement or may attempt to search for quick-fixes in solving problems.	✓ Develops a workable strategy which is well-reasoned and which supports the aim ✓ The learner can identify some of the factual knowledge needed to solve the problems ✓ The learner monitors progress appropriate to reflective practice ✓ Useful suggestions are provided for improvement	✓ Develops an efficient and workable strategy which supports the aim in a clearly focused, complete and creative manner. ✓ He or she recognises when something is missing and finds the appropriate information or solutions. ✓ Clear evidence of the factual knowledge required to solve problems is displayed. ✓ The learner applies the needed techniques (diarising personal development, documenting personal

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
		<p>needed techniques for reflective practice</p> <ul style="list-style-type: none"> ✓ There is evidence of major gaps in the factual knowledge needed to solve the problems that arise, and the learner may not be certain about how to approach the problems/ challenges. ✓ The learner knows when the problem solving is going wrong, but may not know what to do about it. 			<p>experiences of education change; self evaluation etc.), for reflective practice appropriately and effectively.</p> <ul style="list-style-type: none"> ✓ Provides detailed and perceptive suggestions for improvement ✓ If the learner discovers evidence that he or she is on the wrong track, he or she is capable of changing direction.



3.4 Analytic Rubric for assessing Language in leadership and management (Core)

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
<p>Critical Thinking</p> <p>This entails being aware of one’s thinking as you perform tasks and using that awareness to monitor and direct what you are doing. It involves making critical choices concerning what to believe or what to do. This also refers to such basic mental tasks as comparing, classifying, predicting, problem solving and decision making that involves a variable but predictable sequence of thinking skills underpinned by constant critique of “what is”</p>	<ul style="list-style-type: none"> ✓ Demonstrates little understanding and only limited comprehension of scope of problem or issues. ✓ Employs only the most basic parts of information provided. ✓ Mixes fact and opinion in developing a viewpoint. ✓ States conclusion after hasty or cursory look at only one or two pieces of information ✓ Does not consider consequences. 	<ul style="list-style-type: none"> ✓ Demonstrates only a very general understanding of scope of problem ✓ Focuses on a single issue ✓ Employs only the information provided ✓ May include opinion as well as fact in developing a position ✓ States conclusion after limited examination of evidence with little concern for consequences. 	<ul style="list-style-type: none"> ✓ Demonstrates a general understanding of scope of problem and more than one of the issues involved ✓ Employs the main points of information from the documents and at least one general idea from personal knowledge to develop a position ✓ Builds conclusion on examination of information and some considerations of consequences. 	<ul style="list-style-type: none"> ✓ Demonstrates clear understanding of scope of problem and at least two central issues ✓ Uses the main points of information from the documents and personal knowledge that is relevant and consistent in developing a position ✓ Builds conclusion on examination of the major evidence ✓ Considers at least one alternative action and the possible consequences. 	<ul style="list-style-type: none"> ✓ Demonstrates a clear, accurate understanding of the scope of the problem and the ramifications of the issues involved. ✓ Employs all information from the documents and extensive personal knowledge that is factually relevant, accurate and consistent in the development of a position. ✓ Bases conclusion on a thorough examination of the evidence, and exploration of reasonable alternatives, and an evaluation of consequences.
<p>Communication of ideas</p> <p>This describes how</p>	<ul style="list-style-type: none"> ✓ Position is vague ✓ Presentation is brief and includes 	<ul style="list-style-type: none"> ✓ Presents general and indefinite position. ✓ Only minimal 	<ul style="list-style-type: none"> ✓ Takes a definite but general position ✓ Presents a somewhat 	<ul style="list-style-type: none"> ✓ Takes a clear position ✓ Presents an organised argument with 	<ul style="list-style-type: none"> ✓ Takes a strong, well-defined position ✓ Presents a well-

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
<p>effectively the learner can communicate (represent using any of a variety of media) his or her solution and the thinking and processes behind it.</p>	<p>unrelated general statements</p> <ul style="list-style-type: none"> ✓ Overall view of their development is not clear ✓ Statements tend to wander or ramble. 	<p>organisation in presentation</p> <ul style="list-style-type: none"> ✓ Uses generalities to support position ✓ Emphasises only one issue ✓ Considers only one aspect of their development. 	<p>organised argument</p> <ul style="list-style-type: none"> ✓ Uses general terms with limited evidence that may not be totally accurate ✓ Deals with a limited number issues ✓ Views their development within a somewhat limited range. 	<p>perhaps only minor errors in the supporting evidence</p> <ul style="list-style-type: none"> ✓ Deals with the major issues and shows some understanding of relationships ✓ Gives consideration to examination of more than one aspect of their development. 	<p>organised, persuasive argument with accurate supporting evidence</p> <ul style="list-style-type: none"> ✓ Deals with all significant issues and demonstrates a depth of understanding of important relationships ✓ Examines their development from several positions.
<p>Knowledge of the effective use of Language Skills</p> <p>This describes the extent to which the learner has sufficient knowledge and the ability to find appropriate information.</p>	<ul style="list-style-type: none"> ✓ Barely indicates any skill in communicating knowledge and understanding ✓ Reiterates one or two facts without complete accuracy ✓ Deals only briefly and vaguely with concepts or the issues concerning demonstrating understanding of educational policy ✓ Relies heavily on the information provided. 	<ul style="list-style-type: none"> ✓ Limited ability to communicate education policy knowledge without complete accuracy ✓ Provides only basic facts with only some degree of accuracy ✓ Refers to information to explain at least one issue or concept concerning the educational policy ✓ Major reliance on the information provided. 	<ul style="list-style-type: none"> ✓ Uses general communication skills with fair degree of accuracy ✓ Relates only major facts to the basic issues with a fair degree of accuracy ✓ Analyses information to explain at least one issue or concept concerning educational policy. 	<ul style="list-style-type: none"> ✓ Uses communication skills to explain issues involved ✓ Offers accurate analysis of the documents ✓ Provides facts to relate to the major issues involved in demonstrating understanding of educational policy. 	<ul style="list-style-type: none"> ✓ Extensively uses communication skills to provide an in depth understanding of the implications concerning the school and to relate it to past and possible future situations. Offers accurate analysis of the information and issues. ✓ Provides a variety of facts to explore major and minor issues and concepts involved in demonstrating understanding of the educational policy.

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
Observation	<ul style="list-style-type: none"> ✓ No analytical ability even on a descriptive level ✓ Not able to break down information ✓ Cannot relate theory to practice even with considerable assistance ✓ No research was done ✓ Uses repetition instead of compelling argumentation ✓ Position taken is continually shifting ✓ Does not support statements or arguments with reference material ✓ Easy to refute. 	<ul style="list-style-type: none"> ✓ Able to analyse but mostly descriptive ✓ Limited ability to break down information – focuses on a single pro or con ✓ Needs assistance sometimes to relate theory to practice ✓ Inadequate research ✓ Generally illogical arguments put forward ✓ Relies on common sense rather than referring to support material. ✓ Position taken is unclear. 	<ul style="list-style-type: none"> ✓ Appropriate analytical ability though vague in places ✓ Analysis slightly more descriptive than critical and refers only generally to pro’s and con’s ✓ Able to relate theory to practice but with no additional comments. ✓ Some evidence of research ✓ Evidence of a mixture of rational and muddled thinking. ✓ Very little supportive material used ✓ Unsure of position sometimes. ✓ Fact/opinion sometimes overlap. 	<ul style="list-style-type: none"> ✓ Able to analyse accurately ✓ Thoughtful, critical analysis and interpretation – identifies relevant pro’s and con’s ✓ Relates theory to practice with some additional comments. ✓ Sufficient evidence of research ✓ Thoughtfully supported opinions ✓ Supportive material used to back up arguments ✓ Reasoning is logical and clear ✓ A basic position is taken. ✓ Few surprises. ✓ Fact/opinion distinguished. 	<ul style="list-style-type: none"> ✓ Remarkable ability to analyse – identifies the salient pro’s and con’s. ✓ Excellent critical analysis ability – able to recognise a process over time. ✓ Excellent ability to relate theory to practice correctly with additional comments. ✓ Impressive use of source material. ✓ Digs for the truth ✓ Logical, convincing and compelling arguments put forward ✓ Presents complete information that is enhanced by precise and appropriate details ✓ Thought provoking, interesting material used to support opinions ✓ Employs sound reasoning. ✓ Position is clear.

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
<p>Reflection</p> <p>This refers to any reflexive thinking i.e. thinking before, during and after any process/ performance/ product / presentation.</p>	<ul style="list-style-type: none"> ✓ Exhibits close-mindedness or hostility to reason. ✓ Argues using fallacious or irrelevant reasons and makes unwarranted claims ✓ Vague, simple, mechanical reflections on improving the effectiveness of the school's policies and plans ✓ Focuses mainly on surface features ✓ No examples provided, purposeless ✓ One-dimensional, superficial reflections provided (e.g. I like..../I don't like....) ✓ The learner's understanding of the policy is minimal ✓ Hard to read, not organized well. 	<ul style="list-style-type: none"> ✓ Regardless of the evidence or reasons, maintains or defends views based on self-interest or preconceptions. ✓ Considers only one aspect ✓ Two-dimensional reflections provided i.e describes the existing policies with some specifics but includes no insights into how to go about implementing them ✓ Focuses on only a few aspects ✓ They have described individual thoughts, feelings concerning the impact of policy of the management of schools but made no comparisons between the various views on it ✓ There may be evidence that the learner had some insight into the policy but some inferences need to be made as to 	<ul style="list-style-type: none"> ✓ Ignores or superficially evaluates obvious alternative points of view. ✓ Draws warranted, non-fallacious conclusions ✓ Although the learner seems to want to optimise the understanding of policy they are not able to define or clarify the problem areas. This may be due to a seeming reluctance to adopt an attitude of a lifelong learner. ✓ Reflects on the school community views on the policy in a general way ✓ Able to identify strengths and weaknesses. 	<ul style="list-style-type: none"> ✓ Thoughtfully analyses and evaluates obvious alternative points of view. ✓ Draws judicious conclusions – good reasoning ability ✓ An interest is shown towards optimising the school's policies and plans through adopting an attitude of listening, careful observation, asking questions, requesting clarification of pertinent ideas, and consultation with others as necessary ✓ Feelings are shared as well as both strengths and weaknesses of the policy ✓ Includes reflections on debate results that are mostly specific (who, what, where, when, how, why) and penetrating. 	<ul style="list-style-type: none"> ✓ Thoughtfully analyses and evaluates major alternative points of view. ✓ Fair-mindedly follows where evidence and reasons lead. ✓ The learner is highly motivated and in depth reflexive thinking is applied concerning the optimisation of school policy and practice ✓ Analysis of strengths and weaknesses have depth to them and reflections on debate results that are specific (who, what, where, when, how, why) and consistently insightful.

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
		what the learner means.			
<p>Application</p> <p>This describes the extent to which the learner knows and uses appropriate problem solving strategies.</p>	<ul style="list-style-type: none"> ✓ Off task, off topic, illegible, blank or insufficient to score. ✓ Very limited evidence of appropriate register, style or expression ✓ Shifts in tone hardly ever used ✓ Hardly any attention given to target group, purpose, context and format ✓ Very limited application of requirements ✓ No evidence of conducting the parent-teacher meeting <p>OR</p> <ul style="list-style-type: none"> ✓ Evidence of a very limited ability to plan the procedure for the parent-teacher meeting ✓ Evidence of a very limited ability to record observations, experiences, ideas, 	<ul style="list-style-type: none"> ✓ An attempt is made to describe operations, concepts, and processes. ✓ Register and style hardly appropriate, ✓ Shows limited evidence of a personal style ✓ Shifts in tone seldom used ✓ Limited attention given to target group, purpose, context and format ✓ Limited application of requirements ✓ Does not develop or organise the meeting procedure completely ✓ Presents incomplete information with few or no supporting details ✓ Evidence of a basic ability to record some of the following: observations, experiences, ideas, 	<ul style="list-style-type: none"> ✓ Uses language that is partially effective, suited to audience, accurate, and thorough to describe operations, concepts and processes. ✓ Register used often shows evidence of a personal style ✓ Shifts in tone moderately controlled ✓ Moderately adapted to target group, purpose, context and format ✓ Specific requirements moderately applied ✓ Uses language that is minimally effective and accurate, to describe operations, concepts, and processes. ✓ Develops and organises a simple procedure for the parent-teacher meeting plan in a basic way. 	<ul style="list-style-type: none"> ✓ Uses language that is effective, suited to the audience, and accurate to describe operations, concepts, and processes. ✓ Register used very well and shows evidence of personal style ✓ Shifts in tone very well controlled ✓ Very well adapted to target group, purpose, context and format ✓ Specific requirements very well applied ✓ Develops and organises the parent-teacher meeting procedure in a generally focused and complete manner. ✓ Evidence of a confident ability to record observations, experiences, ideas, information and insights that are 	<ul style="list-style-type: none"> ✓ Uses language that is highly effective, audience specific, accurate, and thorough, to describe operations, concepts, and processes. ✓ Register used skillfully, clear personal style ✓ Subtle use of tone enhances writing exceptionally well ✓ Outstandingly adapted to target group, purpose, context and format ✓ Specific requirements thoroughly applied ✓ Develops and organises the parent-teacher meeting procedure in a clearly focused, complete and creative manner ✓ Evidence of innovative choices and divergent approaches, and an outstanding

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
	<p>information and insights that are relevant to the task.</p> <ul style="list-style-type: none"> ✓ Writing contains so many errors in language use that make reading difficult to understand ✓ Minimally completes the task with fragmented results- may need redirection in the future. 	<p>information and insights that are relevant to the task.</p> <ul style="list-style-type: none"> ✓ Ideas are presented in a disorganized way ✓ Work lacks accuracy and completeness; appearance interferes with communication of ideas ✓ Partially completes the task with minimal or perfunctory effort. 	<ul style="list-style-type: none"> ✓ Evidence of a competent ability to record observations, experiences, ideas, information and insights that are relevant to the task. ✓ Work is accurate, neat, and complete ✓ Ideas have been organized ✓ Writing contains few language errors; ideas are not difficult to understand ✓ Substantially completes the task, with some ideas or concepts missing. 	<p>relevant to the task.</p> <ul style="list-style-type: none"> ✓ Writing is original ✓ Writing is clear and organized ✓ Work is accurate and complete; appearance helps the communication of ideas ✓ Completes the task in an incisive and thorough manner. 	<p>ability to record observations, experiences, ideas, information and insights that are relevant to the task.</p> <ul style="list-style-type: none"> ✓ Writing is original and may be creative ✓ Writing is clear and well-organized throughout ✓ Writing is almost free of language errors and is easy to understand ✓ Makes fulfilment of the task a creative expression.

3.5 Analytic Rubric for assessing Manage policy, planning, school development and governance (Core)

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
<p>Critical Thinking</p> <p>This entails being aware of one's</p>	<ul style="list-style-type: none"> ✓ Demonstrates little understanding and 	<ul style="list-style-type: none"> ✓ Demonstrates only a very general 	<ul style="list-style-type: none"> ✓ Demonstrates a general understanding 	<ul style="list-style-type: none"> ✓ Demonstrates clear understanding of 	<ul style="list-style-type: none"> ✓ Demonstrates a clear, accurate

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<p>thinking as you perform tasks and using that awareness to monitor and direct what you are doing. It involves making critical choices concerning what to believe or what to do. This also refers to such basic mental tasks as comparing, classifying, predicting, problem solving and decision making that involves a variable but predictable sequence of thinking skills underpinned by constant critique of “what is”</p>	<p>only limited comprehension of scope of problem or issues.</p> <ul style="list-style-type: none"> ✓ Employs only the most basic parts of information provided. ✓ Mixes fact and opinion in developing a viewpoint. ✓ States conclusion after hasty or cursory look at only one or two pieces of information ✓ Does not consider consequences 	<p>understanding of scope of problem</p> <ul style="list-style-type: none"> ✓ Focuses on a single issue ✓ Employs only the information provided ✓ May include opinion as well as fact in developing a position ✓ States conclusion after limited examination of evidence with little concern for consequences. 	<p>of scope of problem and more than one of the issues involved</p> <ul style="list-style-type: none"> ✓ Employs the main points of information from the documents and at least one general idea from personal knowledge to develop a position ✓ Builds conclusion on examination of information and some considerations of consequences. 	<p>scope of problem and at least two central issues</p> <ul style="list-style-type: none"> ✓ Uses the main points of information from the documents and personal knowledge that is relevant and consistent in developing a position ✓ Builds conclusion on examination of the major evidence ✓ Considers at least one alternative action and the possible consequences 	<p>understanding of the scope of the problem and the ramifications of the issues involved.</p> <ul style="list-style-type: none"> ✓ Employs all information from the documents and extensive personal knowledge that is factually relevant, accurate and consistent in the development of a position. ✓ Bases conclusion on a thorough examination of the evidence, and exploration of reasonable alternatives, and an evaluation of consequences.
<p>Communication of ideas This describes how effectively the learner can communicate (represent using any of a variety of media) his or her solution and the thinking and processes behind it.</p>	<ul style="list-style-type: none"> ✓ Position is vague ✓ Presentation is brief and includes unrelated general statements ✓ Overall view of the problem is not clear ✓ Statements tend to wander or ramble. 	<ul style="list-style-type: none"> ✓ Presents general and indefinite position. ✓ Only minimal organisation in presentation ✓ Uses generalities to support position ✓ Emphasises only one issue 	<ul style="list-style-type: none"> ✓ Takes a definite but general position ✓ Presents a somewhat organised argument ✓ Uses general terms with limited evidence that may not be totally accurate ✓ Deals with a limited 	<ul style="list-style-type: none"> ✓ Takes a clear position ✓ Presents an organised argument with perhaps only minor errors in the supporting evidence ✓ Deals with the major issues and shows some understanding 	<ul style="list-style-type: none"> ✓ Takes a strong, well-defined position ✓ Presents a well-organised, persuasive argument with accurate supporting evidence ✓ Deals with all significant issues and

The level is the mark	Level 1 Minimal Achievement	Level 2 Rudimentary Achievement	Level 3 Commendable Achievement	Level 4 Superior Achievement	Level 5 Exceptional Achievement
		<ul style="list-style-type: none"> ✓ Considers only one aspect of problem 	<ul style="list-style-type: none"> number issues ✓ Views problem within a somewhat limited range 	<ul style="list-style-type: none"> of relationships ✓ Gives consideration to examination of more than one idea or aspect of the problem 	<ul style="list-style-type: none"> demonstrates a depth of understanding of important relationships ✓ Examines the problem from several positions
<p>Knowledge of managing policy, planning, school development and governance</p> <p>This describes the extent to which the learner has sufficient knowledge and the ability to find appropriate information.</p>	<ul style="list-style-type: none"> ✓ Reiterates one or two facts without complete accuracy ✓ Deals only briefly and vaguely with the principles and values informing optimal school management and governance practices ✓ Barely indicates any previous knowledge of contemporary policy ✓ Relies heavily on the information provided. 	<ul style="list-style-type: none"> ✓ Provides only basic facts with only some degree of accuracy ✓ Refers to information to explain the principles and values informing optimal school management and governance practices without complete accuracy. ✓ Limited understanding of contemporary policy ✓ Major reliance on the information provided 	<ul style="list-style-type: none"> ✓ Relates only major facts to the basic issues with a fair degree of accuracy ✓ Explains the values and principles informing optimal school management and governance practices with substantive support ✓ Uses general ideas of the nature and purpose of contemporary policy with a fair degree of accuracy 	<ul style="list-style-type: none"> ✓ Offers accurate analysis of the documents ✓ Provides facts to relate to the major issues involved in optimal school management and governance practices ✓ Uses previous knowledge of contemporary policy to examine issues involved in effective management and school development 	<ul style="list-style-type: none"> ✓ Offers accurate analysis of the information and issues. ✓ Provides a variety of facts to explore major and minor issues concerning the principles and values informing optimal school management and governance practices ✓ Extensively uses their understanding and knowledge of contemporary policy to intervene and establish optimal
<p>Observation</p> <p>This describes the extent to which the learner identifies something as a</p>	<ul style="list-style-type: none"> ✓ Minimally completes the task with fragmented results- may need redirection in the future. ✓ The observer's 	<ul style="list-style-type: none"> ✓ Partially completes the task with minimal or perfunctory effort. ✓ References to the implementation of the vision, policies and 	<ul style="list-style-type: none"> ✓ Substantially completes the task, with some ideas or concepts missing. ✓ The observation includes references to 	<ul style="list-style-type: none"> ✓ Completes the task in an incisive and thorough manner. ✓ The observation includes many references to the 	<ul style="list-style-type: none"> ✓ Makes fulfilment of the task a creative expression. ✓ Observation reflects an in depth knowledge and

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<p>problem and becomes engaged in solving it.</p>	<p>opinions are not substantiated or based on events that occurred.</p> <ul style="list-style-type: none"> ✓ Reflects minimal knowledge and understanding of the principles of school development and governance ✓ It is difficult for the reader to gain an idea of what the situation or setup is like. 	<p>plans may be included in their observation, but the connection to the situation / setup being evaluated may not be clear.</p> <ul style="list-style-type: none"> ✓ The learner generally seems unsure about what to look for. ✓ There is an attempt to describe the situation or setup being observed, but the reader may not gain a clear picture. 	<p>the visions and policies plans that have been translated into agreed operational plans.</p> <ul style="list-style-type: none"> ✓ The observer's opinion is informed by a basic knowledge of the principles of school development and governance ✓ The reader gains a basic understanding of the situation / setup being observed. 	<p>visions and policies plans that have been translated into agreed operational plans.</p> <ul style="list-style-type: none"> ✓ Reflects a thorough grasp of what optimal school development and governance practice entails ✓ Critical judgments are clear and reader gains an insight into the situation / setup being observed. 	<p>understanding of the visions and policies plans that have been translated into agreed operational plans.</p> <ul style="list-style-type: none"> ✓ Observations are insightful and based on careful analysis and observation. ✓ Observational criticism is clearly stated and is based on supportive examples. ✓ The reader gains a clear picture of the situation /setup and an understanding of the observer's point of view.
<p>Reflection This refers to any reflexive thinking i.e. thinking before, during and after any process/ performance/ product / presentation</p>	<ul style="list-style-type: none"> ✓ Exhibits close-mindedness or hostility to reason. ✓ Argues using fallacious or irrelevant reasons and makes unwarranted claims ✓ Vague, simple, mechanical reflections on improving the effectiveness of the 	<ul style="list-style-type: none"> ✓ Regardless of the evidence or reasons, maintains or defends views based on self-interest or preconceptions. ✓ Considers only one aspect ✓ Two-dimensional reflections provided i.e describes the 	<ul style="list-style-type: none"> ✓ Ignores or superficially evaluates obvious alternative points of view. ✓ Draws warranted, non-fallacious conclusions ✓ Although the learner seems to want to optimise the school's policies and plans, 	<ul style="list-style-type: none"> ✓ Thoughtfully analyses and evaluates obvious alternative points of view. ✓ Draws judicious conclusions – good reasoning ability ✓ An interest is shown towards optimising the school's policies and plans through 	<ul style="list-style-type: none"> ✓ Thoughtfully analyses and evaluates major alternative points of view. ✓ Fair-mindedly follows where evidence and reasons lead. ✓ The learner is highly motivated and in depth reflexive thinking is applied in