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# DEVELOPMENT OF PROFESSIONAL TEACHING STANDARDS 2016-2018

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Prepared by the JET Monitoring and Evaluation Division



JET EDUCATION SERVICES

RESEARCH | IMPLEMENTATION | MONITORING & EVALUATION

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# Acronyms

| | |
|---|---|
| APP | Annual Performance Plan |
| CDE | Centre for Development and Enterprise |
| CHE | Council on Higher Education |
| CPTD | Continuing Professional Teacher Development |
| DBE | Department of Basic Education |
| DHET | Department of Higher Education and Training |
| EDF | Education Deans' Forum |
| ELRC | Education Labour Relations Council |
| FEDSAS | Federation of Governing Bodies of South African Schools |
| HEDCOM | Heads of Education Committee |
| HEIs | Higher Education Institutions |
| ITE | Initial Teacher Education |
| M&E | monitoring and evaluation |
| NAG | National Advisory Group |
| NAPTOSA | National Professional Teachers' Organisation of South Africa |
| NASGB | National Association of School Governing Bodies |
| NATU | National Teachers' Union |
| NGO | non-governmental organisation |
| ODI | Overseas Development Institute |
| PEU | Professional Educators' Union |
| PrimTEd | Primary Teacher Education Programme |
| PRODCO | Professional Development Committee |
| PTS | Professional Standards for Teachers |
| ROMA | Rapid Outcome Mapping Approach |
| SADTU | South African Democratic Teachers' Union |
| SAOU | Suid Afrikaanse Onderwysersunie |
| SAQA | South African Qualifications Authority |
| SASA | South African Schools Act |
| SDWG | Standards Development Working Group |
| TEECD | teacher education in early childhood development |
| TLDCIP | Teaching and Learning Development Capacity Improvement Programme |
| ToC | theory of change |

| ToR | terms of reference |
| TVET | Technical and Vocational Education and Training |
| VVOB | Flemish Association for Development Cooperation and Technical Assistance |

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**DEVELOPMENT OF PROFESSIONAL TEACHING STANDARDS 2016-2018**

# 1  Background

## 1.1  Introduction to SACE Professional Teaching Standards development

### 1.1.1  Rationale for the development of standards

In July 2015 SACE commissioned Class Act to deepen and strengthen the SACE discussion paper on professional teacher standards (PTS) through continued consultation with identified role players. A qualitative research approach identified key themes and considerations that emerged from interviewees' perspectives on the proposed professionalisation path, on the research role and on issues relating to SACE's status, role and functions. An initial review of the literature was complemented by a desktop review. Benchmarking and literature review processes also included a comparison of the roles and functions of professional bodies in South Africa (an internal review by SACE).

The development of professional standards for teachers constitutes an integral component of SACE's mandate as articulated in the organisation's Annual Performance Plan for the 2016/17 financial year. The APP is unpacked in greater detail in two important SACE documents that both focus on enhancing teacher professionalisation: Discussion paper and Operationalisation document (SACE 2016b, current in first draft).

As such, SACE committed to the process of developing professional practice standards for teachers in South Africa. SACE is being supported by JET Education Services and the Zenex Foundation in this process. A high-level launch of the process will take place at a proposed national event.

### 1.1.2  Partnership and implementation of the PTS Development

In 2016, the Zenex Foundation agreed to support SACE with the development of professional practice standards for teachers in South Africa.  JET Education Services was appointed to be the implementation partner for the agreed scope of work funded by the Zenex Foundation from December 2016 to April 2018.

### 1.1.3  PTS Development Methodology

JET, as implementation partner to SACE and the Zenex Foundation, conducted the following main activities towards the development of the PTS:

- Engaging and interacting with SACE, government and other stakeholders to raise awareness and gain support for the development of the PTS;
- Planning of the process including purpose, focus, research and events;
- Developing the PTS;
- Piloting the approved draft of the PTS;
- Launching final PTS.

# 2  Introduction to the Monitoring and Evaluation process

## 2.1  Monitoring and Evaluation

### 2.1.1  Rationale for M&E

In its 2014 paper entitled *Better Polices for Development*, the OECD highlights the importance of monitoring and evaluation (M&E) in the development of coherent policies. It further suggests that developing progress monitoring

indicators and evaluating the development process will allow for robust and coherent policies which have benefitted from diverse input. In keeping with this approach, JET, SACE and Zenex wanted to ensure that the PTS development process was research-based and subject to ongoing monitoring and evaluation to ensure its robustness, relevancy and effectiveness as well as the quality and completeness of the outcome.

## 2.1.2 Logical framework

The problem statement and programme goal were discussed in a Theory of Change (ToC) workshop; these discussions also provided information for the development of the logical framework presented below.

THE PROBLEM STATEMENT: The quality of teaching in South African classrooms is highly variable, with little shared understanding among teachers regarding what constitutes professional teaching or a professional culture.

THE GOAL STATEMENT: To develop a set of standards for professional teaching that is theoretically informed, values-based, contextually appropriate and widely accepted by stakeholders.

**Table 1: Logical framework**

| Rationale | Inputs | Processes | Outputs | Outcomes | Impact |
|---|---|---|---|---|---|
| A set of standards for professional teaching will enable educators to develop a shared culture & understanding of what they should know & be able to do with regards to their work in the South African education system.<br><br>**Assumption(s)**<br>Standards for professional teaching can be used across stages of a teacher's career as a consistent framework for initial & ongoing professional development. | Thorough review of literature on the development, benefits & challenges in designing standards for professional teaching.<br><br>Case studies of the rationale, theoretical underpinnings & contextual nuances of standards for professional teaching used internationally, with particular focus on those from other African countries & the global South.<br><br>Case studies of similar processes followed by other professions. | Spearheaded by SACE, iterative processes of broad consultation between a task team appointed to draft the set of generic standards for professional teaching and:<br>• Academics & researchers in the field of teacher development;<br>• Departmental officials;<br>• Union representatives;<br>• Other stakeholders, such as the ELRC;<br>• Recognised subject & phase experts;<br>• Practitioners who are at various stages in their teaching careers; &<br>• Expert practitioners who teach in a diverse range of contexts. | A widely accepted set of standards for professional teaching that is theoretically informed, value-based, & workable within the extreme diversity of schooling in the South African context.<br><br>A set of standards for professional teaching that provides a basis for the registration of teachers' professional designations.<br><br>A growing list of fully registered professional teachers. | A shared culture of professional teaching is embedded in the South African teaching profession.<br><br>A consistent set of standards for professional teaching that is used throughout the career of prospective & practicing teachers, including:<br>• To guide the assessment of pre-service teachers in their initial teacher education programmes;<br>• To guide continuing professional development initiatives;<br>• To guide in-service teachers as they undertake self-monitoring, reflection, collaborative practice & self-appraisal. | A greater degree of cohesion & understanding of policy & practice within the education sector.<br><br>More synergies between the transition points that characterise teachers' careers (including initial teacher education, induction, licensure, mentoring & continued professional development).<br><br>The strengthening of a professional culture among educators.<br><br>A greater degree of professional accountability of educators.<br><br>The enhancement of SACE's role in promoting professionalism.<br><br>An enhanced status of teaching as a professional practice.<br><br>A set of standards for professional teaching that contributes to refining teacher certification standards & the minimum requirements for teacher education qualifications. |

## 2.1.3  M&E Framework

Before developing the M&E framework, an evaluation approach needed to be adopted. This would assist with identifying key indicators that define how adequate a policy development process has been. Given the complexity of policy development, the Overseas Development Institute's *Rapid Outcome Mapping Approach (ROMA): A Guide to Policy Engagement and Influence* (ODI, 2014) seemed appropriate, as it addresses a number of the processes which the SACE-JET implementation team described in the proposal for the development of the PTS.

**Figure 1: ROMA**
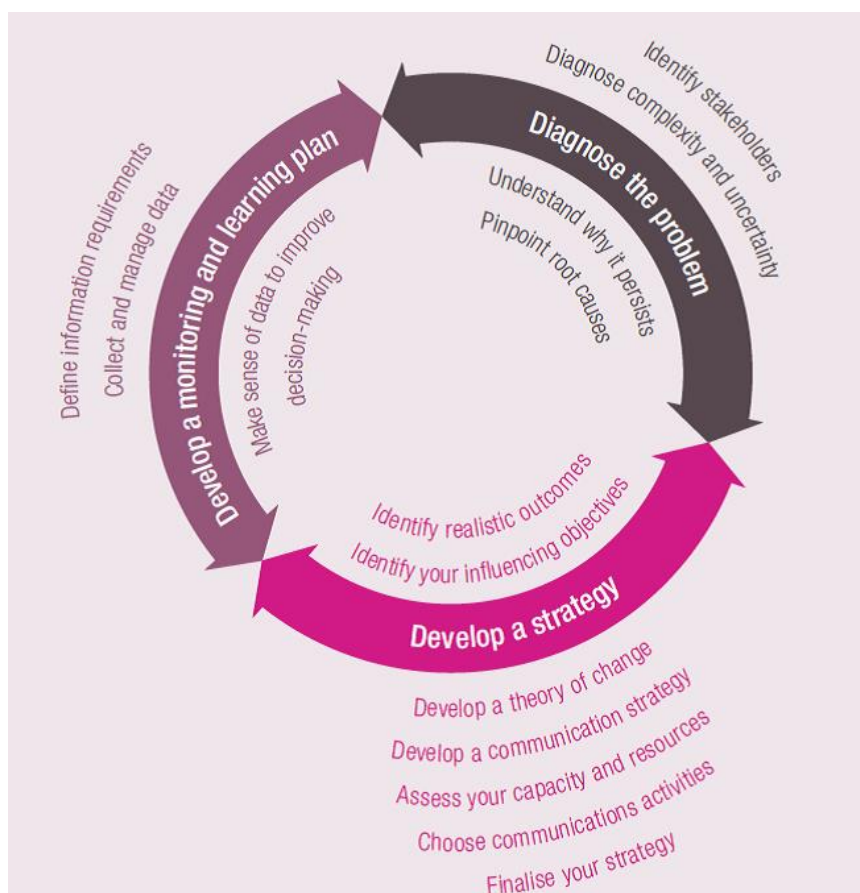


Source: ODI, 2014: 2

ROMA is an approach to improving policy development and engagement processes in order to influence change. It comprises strategies that can be used to identify and diagnose the problem a policy should address, set realistic objectives for policy influence and develop a plan to achieve those objectives and monitor and learn from the process.

Usually ROMA would be used by implementers to get their processes right and track progress, but for this project it was used as a tool for M&E in order to understand the work of the implementers as they explored the problems and root causes and arrived at a diagnosis of the issues they were addressing

(ODI, 2014). ROMA was also useful in taking the implementers through the ToC workshop and provided a broad framework for how to evaluate the PTS development process.

The model described in the diagram entails a three-step process:

- **Step 1 is to identify the problem**: Carrying out a thorough diagnosis helps to better understand the problem's root causes, to decide which aspects of the problem will be addressed by the policy being developed (the standards) and to ascertain who should be involved and what their motivations might be for participating in the process.

- **Step 2 is to develop a strategy**: This necessitates examining stakeholder engagement, clarifying objectives and developing and implementing the planned process (the development of PTS). This step provides a useful first check on how realistic the initial objective is and explains the theory of how the desired change is likely to come about.

- **Step 3 deals with monitoring and learning**: Step 3 helps with understanding how the policy (PTS) would be piloted and implemented and impact could be monitored. It also deals with how data collection and learning might take place during these processes.

The M&E team fleshed out the broad model above by breaking each step down into further activities commonly used in policy development. Each activity was accompanied by questions designed to provide insights into the extent to which each activity and step in ROMA was adequately completed. The table below shows how the ROMA model, policy development activities and evaluation questions fit together to provide an M&E framework for the PTS process.

**Table 2: PTS Development M&E Framework**

| ROMA Steps | Policy Development Activities | Sample Questions |
|---|---|---|
| Understand the problem & context | 1. Identification of the Problem | • What is the problem that was identified?<br>• How was the problem identified? |
| | 2a. Identification of Policy Requirements | • Who were the partners involved in the policy development? Why these partners? |
| | 2b. Identification of the responsible Policy Developer | • Does SACE have the authority to develop policy? |
| Develop a strategy | 3. Drafting | • Was there a theory of change for the policy? What was it?<br>• Who were the stakeholders involved in the design and drafting? |
| | 4. Benchmarking and literature review | • Did the Policy designer/drafters undertake an in-depth literature review of the problem, policy implications, challenges, context, etc.? What were some of the key finding from this exercise? |
| | 5. Consultation | • What was the communication strategy for the consultation? |
| | 6. Revision | • What was the process for dealing with revisions? How many iterations of revision were there? |

| ROMA Steps | Policy Development Activities | Sample Questions |
|---|---|---|
| | 7. Endorsement | • Was there a process for endorsing the draft policy? |
| | 8. Quality Control | • Who did the external/peer review of the final draft to enhance the rigour of policy documentation? |
| | 9. Approval | • Who was responsible for approving the policy? |
| Develop plans for implementation, monitoring and review | *10. Launch (promulgation) | • Is there a plan for the policy to be broadly promulgated to support implementation and compliance?<br>• What is the launch and promulgation strategy? |
| | *11. Pilot/field test | • Is there a strategy to field test the policy? What is the strategy? |
| | *12. Implementation | • Who is responsible for ensuring implementation? |
| | *13. Compliance Monitoring and Evaluation | • Who will monitor the implementation?<br>• Who is responsible for compliance issues? |
| | *14. Review | • Is there a strategy for review in place? How often will this take place? Who will be responsible? Involved? |
| | *15. Continued management | • Who is responsible for the continued management of the policy implementation? |

*In the table above, those policy development activities which have not yet been completed (10-15) are marked with an asterisk and are therefore not a subject of this report.

## 2.1.4  Methodology

The evaluation made used of observation and desktop analysis in order to collect data during the PTS development process. There are benefits to using observation in a complex and sensitive process such as policy development: the evaluator is better able to understand and capture the context within which people interact; gaining first-hand experience of a process allows the evaluator to be open to discovery and inductive evaluation; as a participant observer, the evaluator is able to see things that routinely escape awareness of participants themselves as they are involved in the process; and finally, observation provides an opportunity to observe things which people might be unwilling to discuss in an interview.

The evaluation of the PTS development process involved structured and semi structured observations. Semi structured observations involved broadly viewing what happened during the PTS development activities and taking notes which with some evaluation questions in mind to provide some structure. The structured observations made use of a template where only the information required on the template was collected during the activity. In addition, all available documents were reviewed to support the observation process.

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# 3 Findings and Discussions

This section explores the extent to which all the planned events, meetings and consultations were implemented during the PTS development process. All the implementation meetings, workshops and consultations are listed below and discussed in detail later in this section.

- National Advisory Group Meetings;
- Steering Committee Meetings;
- Round Table Meeting;
- Theory of Change Meeting and Development of Logical Framework;
- Literature Review and Consultations Meetings;
- Union Engagement Consultations;
- Standards Framework Design Meeting;
- Development of the Standards and Amendments;
- Standards Development Working Group (SDWG);
- SDWG Subgroups;
- Standards Development Joint Meeting;
- Provincial consultations; and
- Newspaper Adverts and Standards Gazette and Commentary.

## 3.1 Overview of Implementation

The key consultations and events took up a total of approximately 273 hours; based on the attendance registers, the events, meetings and direct contact consultations involved around 1,780 (1,265 continuing professional teacher development (CPTD) and 515 SACE consultations) distinct individuals (including members from the partner organisations) who participated in one or more of the events. The 273 hours do not reflect time spent on:

- Office based logistics and administration (120 hours);
- Planning and preparation (240 hours);
- Desktop research and literature review (240 hours);
- Writing and amending the standards (400 hours);
- Theory of change, logical framework and M&E reporting (80 hours); and
- Miscellaneous activities and meetings (40 hours).

The hours spent on the activities listed above were estimated based on timesheets and the days allocated days to each activity in the project plan. All evidence suggests that members of all partner organisations and the implementation team as a whole invested more time in the PTS development process over the 18-month period of the project than was envisioned in the original proposal and implementation plan. In addition, the 60 events and consultations exceeded the number of planned activities and events by around 30%, meaning that the implementation team planned and were involved in many more activities and events than they initially planned. Some savings in the budget on some line items may have allowed for some of these additional activities; however, it is not entirely clear how the additional time and activities were accommodated.

Activities conducted in 2016 were mostly exploratory and related to understanding the problem and context of the professional teaching landscape. Events such as the National Advisory Group (NAG)

meetings, literature and research consultations and the theory of change meetings were part of the conception phase and occurred before the official launch of the project on 1 December 2016.

In 2017, the bulk of the background research, literature and theory of change aspects had been explored, and the SDWG and subgroups were established and provided guidance and ideas to the implementation team who were writing the standards. By July, a draft of the standards was ready for input from various consultation forums, and the joint standards meetings and provincial and national consultations commenced.

In 2018, the process of collating comments and surveying consultation participants began. The focus in this phase was consolidating comments - deciding which to accept or reject - and amending the draft document. The document was prepared for advertising in various media to elicit oral, email and online comments prior to being officially gazetted. The draft text for gazetting was formally handed to SACE in early May 2018.

## 3.2  Details of Key Activities

The details of the key development activities are given below. These have been ascertained through observations and the review of the project documents.

### 3.2.1  National Advisory Group Meetings

The National Advisory Group is a working group of 20 key role-players in education who, in 2015, committed to support SACE with the development of professional standards for teachers. The group meets quarterly and met 3 times in 2016 in order to get the standards development process started. The group is composed of stakeholders from: the Department of Basic Education (DBE); the Department of Higher Education and Training (DHET); the Education Deans Forum (EDF); teacher unions: Suid Afrikaanse Onderwysersunie (SAOU), Professional Educators' Union (PEU), South African Democratic Teachers' Union (SADTU), National Teachers' Union (NATU) and National Professional Teachers' Organisation of South Africa (NAPTOSA); the Federation of Governing Bodies of South African Schools (FEDSAS); the National Association of School Governing Bodies (NASGB); the Education Labour Relations Council (ELRC); the South African Qualifications Authority (SAQA); and the Council on Higher Education (CHE). Additional members include representatives from the Centre for Development and Enterprise (CDE) and the Flemish Association for Development Cooperation and Technical Assistance (VVOB) as well as independent experts, etc.

The NAG meetings were held as part of initiating the PTS development project, with three in-depth meetings taking place in 2016; one meeting before the official June 2016 start date and soon after the start of the development process with these meetings happening before the national launch in December 2016. Over the three meetings, between 25 and 28 people were invited to each meeting - these included the 20 NAG members as well as researchers, guest presenters etc.; attendance varied from 90% at the first meeting to 70% and 82% at the second and third meetings respectively. The logistics and planning related to these events were good, with attendees being notified of the meetings at least month in advance. Some participants also had travel arrangements which had to be accommodated, and this was managed well by the SACE and JET administrators. The venue for the meetings was the SACE offices in Pretoria. The venue was spacious enough, with adequate facilities and was conducive to successful engagement amongst participants. SACE also provided more than sufficient catering for the events. The meeting agendas were prepared well in advance. However, the meetings were not consistent in how they were recorded, with one meeting having official minutes, another being voice recorded and another having notes on the key points raised during the meeting.

The strategic focus of the meetings was to provide high level guidance for the PTS development process; some of the agenda items from the three meetings are listed below:

- SACE's mandate to develop standards and who they will account to in this respect;
- PTS development coherence with other policies and standards;
- How the teachers' registration process with SACE will be impacted by the standards;
- Implications of PTS in South Africa and possible contextual issues.

Participants in the NAG asked many questions about the standards' overall purpose, design, advocacy and communication strategies, etc. Some examples of questions are presented below:

- What is the purpose of roadshows, provincial and national consultations in 2016?
- Who are the target audiences in the national and province consultations?
- In these consultations and in the professional standards, how will the difference between qualifications with designations be clarified?

The meetings were chaired by a JET staff member and there were a minimum of two presentations per meeting. The presentations by and large directed the focus of the meeting, with issues or lessons arising from those presentations being the subject of questions, concerns and discussions. Some presentation titles are listed below:

- Higher Education Institution Research on Professional Standards - Marang Programme;
- Progress with CDE Research "Towards Teacher Professional Knowledge and Practice Standards in South Africa";
- Literature Review on Development of Professional Standards for Teachers by Dr Lee Rusznyak;
- Findings from the Initial Teacher Education Research Project.

Overall, the meetings were well organised and action items were followed up on and communicated both through email and at subsequent meetings. The meetings adhered to the agenda, although discussions on certain key topics or responses to particular questions on occasion ran over the allocated time, resulting in some presentations or discussions being more hurried than others.

## 3.2.2  Steering Committee Meeting

Comprising eight decision makers from partner stakeholders SACE, JET and Zenex, a steering committee was put in place in order to monitor progress and provide strategic support and guidance to the implementation team. The group met 10 times (every two months) over the course of the PTS development process in order to ensure the project moved forward and had a nuanced and balanced approach to envisioning and presenting the standards.

Steering committee meetings were highly organised, with meeting dates established at least a month in advance. All meetings had agendas which were adhered to both in terms of time and items to be covered during the meeting. All meetings were well minuted, and the minutes stored in a project folder. These meetings were usually facilitated by Dr Keevy from JET. Project updates, presentations of work and challenges being experienced directed the focus of the steering committee meetings.

## 3.2.3  Round Table Meeting

A detailed, day-long discussion on the development of professional standards brought various stakeholders including different professional councils, the DBE, teacher unions, the Heads of Education

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Committee (HEDCOM) and other education organisations together to take the process forward and discuss ways to enhance teacher professionalisation. The NAG members were also included in this consultation meeting.

This consultation allowed for in-depth discussions on the various stakeholders' aims for and expectations of the PTS. Topics explored included SACE's mandate to develop the standards and how this may impact SACE's other functions such as the registration and possible reregistration of teachers. The meeting also considered how SACE would communicate the PTS and related changes to teachers and investigated how the changes would be practically implemented, keeping mind the presentations given by other professional bodies and the lessons learnt from them.

## 3.2.4  Theory of Change Workshop

The ToC workshop took place in July 2016 as was attended by 15 out of the 25 key stakeholders who were invited to participate. The purpose of a ToC workshop is to enable the various stakeholders who might hold different views about the ultimate purpose of a project to come together to discuss their views on the project's potential aims.

The PTS ToC workshop was devoted to crafting a clear definition of the long-term outcome project participants hoped to achieve through the project's activities. The agenda aimed to cover the following items:

- Developing a common understanding of key ToC concepts and definitions;
- Identifying the project's purpose, goals and objectives;
- Identify the long-term outcomes;
- Developing a pathway of change for the programme to follow (linking objectives and outcomes to possible actions);
- Operationalising outcomes tasks (Activities);
- Defining Interventions (Inputs, outputs, short- and medium-term outcomes); and
- Articulating assumptions.

This agenda proved to be too ambitious and only around half of the intended topics were covered. Because the project was still in its exploratory phase in July 2016, participants spent a lot of time discussing the problem the standards would address, the focus of the standards (especially in relation to other existing standards and policies) as well as the goal and purpose of SACE's PTS development project.

## 3.2.5  Literature Review and Literature Engagements

The purpose of the literature and document review was to support SACE to avoid potential pitfalls in the PTS development process by documenting lessons learnt from countries that have already undertaken a similar process and established professional standards for teaching.

A significant part of the literature review was the summary of the country case-study conducted by Dr Jane Hofmeyr, which reflected the process followed by six countries in developing their PTS. The countries concerned were: the United States of America; England; Australia; Chile; Jamaica; and Namibia. The countries' processes were compared and best practices benchmarked. In addition, a summary of the processes followed in Nigeria, Belgium and Qatar was provided. The selection of countries for the case studies was deliberate: the three English-speaking countries (United States, England and Australia) are considered the first advocates of PTS, and their standard systems have evolved over many decades; the developing countries (Chile, Jamaica and Namibia) were selected mainly due to the availability of

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information; and the three additional countries were selected because there was some literature available and a personal contact was made by a representative from Nigeria.

The literature review process was iterative and took much longer than initially expected. The process involved consultations with the NAG, engaging with other research and other literature. There are many lessons that emerged from the review of the countries that have already developed PTS, although a shortcoming was the scarcity of literature from other African countries.

### 3.2.6  Union Consultations

The various teacher unions were engaged through individual meetings with the project partners in order to obtain buy-in from the unions and at the same time provide an important opportunity for the unions to deepen their involvement in and contribution to the standards development process.

### 3.2.7  Standards Framework Design Meeting

The purpose of the day-long Standards Framework Design Workshop was to discuss the focus, substance and structure of the SACE PTS in a large, think-tank type format. This was a strategic meeting which used the feedback from previous meetings to help direct the focus of the standards and compare that focus to what the literature and benchmarking processes had highlighted as best practice. This full-day meeting was well attended and provided commentary from an array of stakeholders representing the entire education environment. Some interesting issues raised in the meeting follow:

- SACE's approach to informing teachers of the standards against which they could improve their practice;
- The challenge of explaining how the standards could improve the quality of teaching and learning and get teachers' buy-in;
- The challenge of setting up a vision of exemplary practice in teaching (what good teaching looks like and what is it that teachers are not doing well), without making teachers feel overburdened by yet more policy;
- Developing a common language of practice for teachers and understanding the importance of how that could provide criteria for self-reflection, self-monitoring and self-improvement;
- Setting practical benchmarks and examples of good practice;
- Opening up possibilities for continuous learning.

Overall, this was a very important meeting for not only raising awareness but for getting buy-in from representatives of unions, universities, provinces, etc. who were present at the meeting and the subsequent launch event which followed this meeting. Participants in the Standards Framework Design Workshop asked many questions, and the discussions were relevant and on topic, which showed that the meeting was a good starting point for the consultative process.

### 3.2.8  Standards Development Working Group (SDWG)

In line with its mandate, in late 2016, SACE set up the SDWG to develop professional standards for educators. The SDWG comprised representatives of all key stakeholders: education departments; statutory bodies; teacher unions and associations; independent schools; education faculties of higher education institutions (HEIs); educators; and researchers.

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This working group asked relevant questions and often pushed the implementation team to consider important and sometimes oversimplified assumptions around how to practically implement the standards, accessibility of language and coherence with other policies, etc. On average, during SDWG engagements, two or three substantial questions per hour were raised, providing sufficient impetus for direct discussions for five to seven minutes per question. During each meeting, there were at least three questions posed which required follow-up, and these were added to the action items list at the end of the meeting. Examples of some points raised during SDWG meetings include:

- The standards should be a professionality issue and not an accountability or compliance issue and, as such, should not be linked to any labour related or incentive processes.
- SACE needs to be careful about how it links the fulfilment of the standards criteria to the professional registration process and how this may impact current teachers.
- SACE should also consider more seriously how it will establish criteria to assess the quality of teaching and learning being delivered as a result of orientation to the standards.
- Has there been any thinking around recognising and promoting effective practice?
- How will the standards encourage establishing a safe space for general agreement among teachers to reflect on their own levels and to determine their growth pathways based on a shared understanding.
- The standards are a tool for formative development towards an ever better/increasingly higher level of practice. Some of this information needs to accompany the standards.

## 3.2.9  SDWG Subgroups

Focus groups with three to five recognised expert teachers, subject and phase experts were held in Gauteng and the Western Cape. These meetings were facilitated by two consultants who were also involved in the development of the standards and the SDWG meetings. Since teachers were the participants in these focus groups, they provided an opportunity for important questions to be raised about how the PTS would affect teachers practically and how the standards would contribute to pulling together other policies and standards and creating coherence. Participants asked many question during these sessions and some of the feedback, questions and concerns raised are mentioned below:

- The language in which the standards are framed must be clear and not overly academic and theoretical: the language must be simplified to make the standards accessible to all teachers.
- The standards are well articulated. There is a need to ensure that once the wording is finalised, all the standards are coherent with other standards and policy language, especially standards for teacher professional learning.
- It is possible to incorporate inclusivity into all the standards by using alternative wording.
- We should have a bigger picture in mind of the kind of teacher we are envisaging and the kind of learner we would like to see emerging from the system informed by the implementation of these standards.
- Does the technical and vocational education and training (TVET) sector need a separate professional body/council?
- How do TVET lecturers differ from school teachers? What is common? How do the standards apply to TVET lecturers? The language must be appropriate if it is to include them.
- How will the standards process involve the employers, unions and HEIs?
- What does "licence to practice" mean for a college lecturer? Where do college lecturers register, will they follow the same process as newly qualified teachers?

## 3.2.10 Standards Development Joint Meeting

A joint meeting of the different standards working groups was organised by the DHET in collaboration with the DBE, SACE and JET. The meeting covered: (1) professional teaching standards overview (SACE); (2) knowledge and practice standards for primary mathematics and literacy teacher education (PrimTEd); (3) be professional teaching standards for inclusive education; (4) knowledge and practice standards for teacher education in early childhood development (TEECD); and (5) teacher competencies for digital learning. The main propose of the meeting was to facilitate collaboration and common understanding between the different groups.

This meeting was a large meeting of 44 participants and was very well attended, with 80% of invitees attending. Participants included representatives from the DBE and CHE, from all the universities and the five teacher unions, independent researchers, non-governmental organisations (NGOs) and research organisations.

The meeting was facilitated by Ms Michelle Mathey from the DHET and Dr James Keevy from JET. Dr Whitty Green, also from the DHET, delivered the presentation on the general context of standards for teacher education.

Each group presenting was required to address the following questions:

- What is your group's understanding of the notion of standards that the group is developing, and what is the purpose of the standards?
- What nomenclature are you using to describe the standards?
- What is the architecture of the standards - e.g. what domains, progression and specifications are being used? How do the standards look?
- How are the standards being developed? Brief summary of who is in the working group(s) and how the work is structured. Where are you now?

The participants completed a survey at the end of the workshop. Following the discussions on the various standards development processes underway, 80% of participants indicated that they were very clear or clear on the SACE PTS standards and the inclusive education standards, but only 50% were clear on the standards relating to TEECD, PrimTEd and digital learning following the workshop.

Some of the proposed actions arising from this meeting included:

- Developing a glossary to be circulated to all working groups for inputs: The glossary will provide guidance and contribute to more consistent use of nomenclature.
- Proposing a high-level architecture to guide the format of the standards: This will not be for compulsory use.
- Maintaining ongoing dialogue between the working groups: Groups were requested to provide dates to the DHET to try and align joint meetings to those of the working groups to save on costs.
- Establishing a repository for the draft standards and related materials: The work of the PrimTEd group is advanced in this regard, and it was suggested that the PrimTEd facility be expanded to allow for all working groups to share resources.
- Making a distinction between standards for teaching (SACE, inclusive education, digital Learning) and standards for teacher education (PrimTEd, TEECD) would be useful to guide further work.

The meeting identified the following matters for further consideration:

- Implementation of the standards being developed, including indicators that are measurable;
- The relationship between the SACE PTS and the Inclusive Education Teaching Standards: A broader mapping of these standards, as well as the standards for TEECD, PrimTEd and digital learning is required
- The capacity development of teacher educators (lecturers);
- The tension between using the standards for developmental and accountability purposes;
- Standards should be dynamic and working groups should consider ways in which this can be included in the design.

It was noted that the standards will most likely be published as "Ministerial Statements" and not policies, and the combined publication of all standards may not be possible at this stage but will be of great value at a later stage.

## 3.2.11 Provincial Consultations

Across all nine provinces, consultations were conducted from October 2017 to January 2018 and involved 382 delegates. Additional presentations of the PTS were conducted by partnering with the CPTD Seminar Series which addressed 1,265 SMT members in four provinces between February and March 2018. Attendance was somewhat erratic at these events: many had good attendance rates of around 80%, while one meeting had an of only 60%. Many of these sessions also started late because of having to wait for teachers to arrive from their various schools.

The meetings followed the same format and made use of the same agenda and presentations and were opened with a welcome by the SACE CPTD Manager. The project partners (SACE, JET, Zenex and the DBE) were acknowledged, as were the national and provincial education department, and teachers were thanked for making the effort to attend. In some meetings, the purpose and objectives of the meeting were not discussed; it seemed to be assumed that the participants knew why they were there, while in other meetings the purpose and objectives were addressed later, during the presentations. The presentations (introduction to teacher professionalism and overview of the professional standards) were relevant to the purpose of the meeting, informative and attractive.

The first presentation was on teacher professionalism and provided the context (including the policy context) for the standards development process. This presentation was followed by a question and answer session which provided an opportunity for the participants to raise queries and concerns. Some were directly relevant, while others related to challenges regarding the registration of teachers with SACE (which could be considered a related problem, as challenges with registration are likely to have a knock-on effect in the implementation of the standards). The queries and concerns raised included the following:

- Will full registration with SACE (and the awarding of the designation 'professional teacher') have an end date?
- Do the standards apply to qualified teachers who are no longer working in the classroom (e.g. Department of Education officials and university lecturers)?
- Do the standards apply to qualified teachers who are working abroad?
- How does this align with or differ from the current registration system?
- Does SACE have the capacity to handle the proposed new registration process (given challenges with the current system)?
- What will be done about teachers with "false" qualifications?

All of the questions and concerns raised by participants were responded to, and the participants seemed satisfied with the answers which were provided. In discussing the problem that the standards aimed to address, the main issue raised was that teachers are currently at different levels and it would be very difficult, time-consuming and expensive to ascertain these levels. There was also a discussion about the possibility of push-back from teachers and unions. The facilitators explained that the policy would apply to all teachers and it was a standard which all teachers should work through. However, following the entire process to accredit or certify teachers would only apply to new teachers in the system as it did not seem reasonable or practical to remove certification from teachers who were already in the system and certified by SACE. The suggestion that teachers reapply for certification every few years and provide evidence of meeting the standards at various levels each time was not met with enthusiasm.

The second presentation provided an overview of the draft standards. The presentation brought the standards to life with practical examples of their application to real life teaching contexts. This presentation was not followed by a question and answer session; rather, the participants went straight into groups to review the standards. The participants were allocated to groups based on the table they were sitting at and each table was asked to review one standard. Thereafter, feedback was given in plenary. The allocated time for feedback was not sufficient (or it should have been facilitated differently) as not all the standards were covered. Moreover, feedback on a particular standard was only given by the group which had reviewed it; participants thus did not have the chance to provide input on the standards which they had not discussed in their group work. The following feedback was given:

*Standard 1 – Ethical teaching is based on a commitment to the learning and wellbeing of all children*

- This standard must be adopted at school level and integrated into school policies (additional consideration).
- Teachers should promote and inculcate democratic values – tolerance and respect (additional consideration).
- The standard consider that teachers do not choose who get to be in their classes and some teachers may not be 'mentally prepared' to cater for some learners as required by inclusive education.
- It may also not be practical for teachers facing overcrowded classes, as one teacher cannot be expected to understand all learners as individuals.
- Parents' lack of commitment to attending parent meetings exacerbates the situation as it makes it difficult for teachers to understand challenges faced by learners.
- Provision of more teachers is necessary to balance out the teacher : learner ratio and allow teachers to be more attentive to learners' challenges.
- It may be necessary to foreground some of these expected environmental challenges.

*Standard 2 – Teachers collaborate with others to support teaching, leaning and their professional development*

- Expecting all teachers to be mentors is unrealistic as mentoring requires professional preparation and not all teachers can be mentors.
- Teachers operating as educational activists can cause friction with authorities. The South African Schools Act (SASA) stipulates that authorities have been entrusted with addressing activism. Therefore, teachers acting as activists could be viewed as disregarding SASA's authority.

*Standard 3 – Teachers understand that language plays an important role in teaching and learning*

- Language issues and challenges should be discussed during initial teacher education. For example, Mathematics and Science formulas and rules often cannot be translated. Although South Africa has 11 official languages, there are rural schools in the Northern Cape where the learners' home languages are San languages (additional consideration).

*Standard 4 – Teachers promote social justice and redress inequalities within their educational institutions and society more broadly*

- Questions regarding how teachers redress the inequalities of the past if nothing in their schools has changed were raised. Many schools are already facing issues of inequalities that have not been dealt with for a long time; how are teacher then expected to address issues that have existed for so long without any solutions?
- The implementation of the standards was difficult to understand for some. The government should be ensuring that inequalities are redressed first before teachers can be expected to abide by the Standard 4. Also, the practicality of this standard in cases of schools that are under-resourced was questioned.

*Standard 5 – Teachers make judgements that are conceptually informed, responsive to learners and contextually appropriate*

- Some concepts may be difficult to understand; synonyms could be used to make this standard easier to understand (consideration).
- Teachers need to understand the context (the community and home context) of their learners (additional consideration).
- Teachers often do not fully understand the relationship between theories and practice; there is a need to simplify this crucial link.
- It was suggested that Standard 5 should also stipulate that teachers should present reflections or feedback to learners in a manner that considers the learners' perspectives and is not dictatorial.

*Standard 6 – Teaching is based on teachers' deep understanding of the subject/s they teach*

- Teaching is additionally based on deep understanding of the phases which teachers teach (additional consideration).

*Standard 7 – Teachers understand how their subjects are best taught and learnt*

- Not all teachers are trained in the subject they teach; this is especially concerning in the higher grades.
- Teachers are often switched between subjects and phases and this is not conducive to developing an expert approach to subject teaching

*Standard 8 – Teachers interpret the national curriculum to plan systematic sequences of lessons*

- Obtaining data on curriculum coverage is challenging (additional consideration).

*Standard 9 – Teaching involves organising, monitoring and assessing learning*

- Implementation will be challenging and the learner: teacher ratio in schools may need to be reviewed (additional consideration).

- In point 3 'Teachers use learners errors as important data for understanding what leaners misunderstand and for thinking about ways to improve their teaching' the word 'improve' can be changed to 'differentiate'.

***Standard 10 – Teaching requires that well-managed learning environments are created and maintained – not discussed***

It was unfortunate that in many sessions feedback was only provided on six or seven of the 10 standards. After the standards were discussed individually, the facilitators asked the participants whether they thought anything was missing and should be added. It was noted in two meetings that parental involvement should be foregrounded more in the standards - either in an additional standard or collaboration with parents and guardians being addressed by standard 2 (2.1).

In addition to the verbal feedback, participants received handouts on which they could make notes. However, it was not clear at all meetings if these were handed in for collation purposes. It was also unclear how the meeting notes were being taken and collated; one of the facilitators explained that she was making notes which she would collate afterwards. However, it is challenging to facilitate and take notes at the same time.

After the feedback session, the facilitators proceeded to discuss the way forward, and participants were encouraged to submit further feedback on the draft standards online via a Google form at: bit/ly/SACE-PTS-FEEDBACK or via email to member@sace.org.za. The link clicks through to a short online survey which also provides the opportunity for respondents to submit comments per standard. Finally, the participants were given an opportunity to complete the SACE registration forms, and the facilitators thanked the participants for their contributions.

Overall, these meetings were well facilitated by two SACE staff members. The presentations were interactive; the lead facilitator made a point of pausing and posing questions to engage the participants (e.g., "What is the difference between a qualification and a designation?") and incorporating the answers given into her presentation. The presentations were well delivered, with practical, relevant examples being used, for example, to explain the standards. The facilitators were knowledgeable about the standards, the process via which they are being developed and the process of teacher registration with SACE (with which some challenges were reported, as mentioned previously). There were no questions or comments which the facilitators were unable to respond to or which they responded to inadequately.

Facilitators felt some provincial consultation meetings were challenging as, in some instances, participants were not very vocal. Due to the purpose of the meeting being the presentation of the standards, the facilitators spoke a lot; the communication was, nonetheless, not one-sided. Participants engaged by asking questions and giving feedback on the standards; the only limiting factor appeared to be time for engagement and feedback. Some participants, especially those who were from the provincial departments of education and not districts or schools, contributed to the discussions more than others, although the majority of participants contributed in some way.

The questions asked in these sessions were clearly quite different from those raised in the other meetings, indicating that the concerns and questions of teachers with respect to the standards and their implementation are different from those of other stakeholders in the education environment; thus getting teachers' feedback was imperative.

## 3.2.12 Newspaper Adverts and Standards Gazette

An advertorial containing the standards (and contact information for SACE and JET if people wanted more information or to comment) was run in the Sunday City Press for two weekends in March. An official call

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for public comment on the standards was due to be gazetted and published in the Sunday Times at the end of April. This process is currently ongoing and will be further explored in the M&E report for the next phase.

# 4 Conclusions

The PTS development process has entailed extensive work in **identifying the problem**, as outlined in the ROMA model for policy engagement and development. The process has taken over a year, with various documents being prepared to show evidence for existing gaps in the policy environment which would be addressed by the PTS.

**Developing a strategy** is the next phase in the ROMA model. In many ways, this was an area of strength in the PTS development process, especially with respect to the number of hours and effort that went into planning and holding meetings and events to ensure adequate internal and external consultation. With almost 1800 individuals being consulted, the PTS development process can be said to have been robust. While the duration of meetings and events and the fact of having to present the requisite information may have limited the amount of time that could be allocated to participants' questions, it was clear that there were many avenues available for participants to engage with, comment and become involved in the PTS development process. Surveys showed participants had positive reviews of the consultation experiences and had developed an awareness of the content and purpose of the PTS standards. In terms of the literature which was reviewed in the drafting process, more could have been done to get input from other African countries, for example, Kenya and Uganda, who may have already developed teacher professional standards and which could have provided useful pointers for the process in South Africa.

This second phase of the ROMA model seems to have been well managed but can only be commented on in its entirety once the endorsement, quality control and approval processes have been concluded. These processes appear to be on track and their adequate completion will be paramount to the success on the entire PTS development process.

# 5 Note of thanks and way forward

JET wishes to thank the Zenex Foundation for its foresight and commitment to this initiative. The Foundation's involvement went far beyond that of a typical funder. Ms Saguna Gordhan, in particular, played an active role in the work of the SDWG, the Steering Committee and several other instances, providing active guidance and support to the JET and SACE teams. We also recognise the willingness of the Foundation to extend the project beyond the initial 12 months to allow for more thorough consultations.

Several people that played an active dole during the PTS development process are acknowledged:

- Prof Lee Rusznyak for taking the role of conceptual lead, for developing the theoretical basis for the standards and for doing the bulk of the drafting;
- Dr Jane Hofmeyr for always being willing to share her expertise and for playing an active role in the drafting of the standards;
- Drs Muavia Gallie and Renny Somnath for active involvement and contributions throughout the process;

- Dr Faith Kimathi, post-doctoral fellow at Wits, supported by the Zenex Foundation, and working under the supervision of Dr Rusznyak at Wits;
- Members of the SDWG that comprised more than 30 people at different stages of the process;
- Mr Gerrit Coetzee and Ms Lulekwa Tshambula from the DBE for playing an active role in the process and ensuring that the strategic priorities of the DBE remained top of mind;
- Dr Nhanhla Nduna-Watson for ongoing support and guidance in her role as PRODCO member;
- JET colleagues, including Ms Benita Reddi-Williams, Dr Nick Taylor and Ms Pinky Magau.

We also wish to acknowledge SACE, initially under the leadership of Mr Rej Brijraj, and later, Ms Ella Mokgalane, for the openness with which they allowed the team of experts, under JET's guidance, and with the support from the Zenex Foundation, to play this critical role. The transparent and constructive engagements possible with the SACE staff and Council members provide the ideal context for this work to take place. Mr Manare Mabelebele is acknowledged for administrative support and Ms Vanencia Chiloane, who joined SACE towards the end of this project, is acknowledged for taking ownership of the work and becoming the ambassador for the PTS.

While it may feel like the work is completed, it really only starts now. The important conceptual framework is now in place, but the consultations and field testing lie ahead, followed by careful and phased implementation. JET is committed to providing ongoing support in key areas for as long as this is required, but the process belongs to SACE, while the professional teaching standards belong to the profession itself, represented by every teacher in South Africa.

JET Education Services

19 May 2018

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# Annexure 1: Evaluation approach

## Identification of the Problem

Policy development steps 1 to 3 focused on how the problem was identified and what emerged as the main problem which the PTS development process would address. Five questions were used to interrogate this step; which also corresponded with the ROMA model area "Understand the problem and the context".

The problem was identified through a literature review process, theory of change workshop, logical framework development and the consultations in the NAG meeting as well as in the SDWG 1 meeting which highlighted challenges in the Sout African context. The main problems identified that the PTS could potentially resolve were the lack of qualified individuals entering the teaching profession and the high proportion of unqualified teachers in the system, among others.

One participant noted that there are several policy documents in South Africa that reference professional standards for teachers, but with no definition of these standards. This then lead to a discussion around what the standards should not address. The group agreed that the standards should not address the issue of qualifications as the universities are more than able to work through that. Additionally, the participants highlighted that the standards should not include ethics as this is already addressed by the SACE code of conduct. Finally, the group believed that the standards should not discuss professional development.

The key contexts which were discussed as important in the development of the standards were:

- The differential capacity of teachers in South Africa;
- That South African teachers' professional status is weak and does not meet several of the criteria listed by McBeath: The tendency currently is to bolster the teaching profession through various mechanisms such as the improvement of initial teacher education programmes and the revision of the initial teacher education qualifications, the offering of continuous professional development, the introduction of induction programmes for newly qualified teachers and, more emphatically, the development of teacher professional standards.

## Identification of Partners in the Process

Who are the partners involved in the policy development? Why these partners? The Zenex Foundation, SACE and JET have partnered for the PTS development process. SACE has been mandated by government to ensure the professional registration of teachers and ensure continued professional teacher development, while Zenex and JET have worked in the education space for decades. JET will assist with the implementation of the development while Zenex will provide additional funding and oversight.

Other stakeholders involved in this area or in the development of policy in this area include the DBE, currently undertaking the development of PrimTEd standards, the Department of Social Development, undertaking the development of standards for ECD as well as researchers at universities and NGOs such as CDE and JET who conduct research relating to policy. The process of developing the PTS called upon SACE to work collaboratively with Higher Education South Africa's Education Deans Forum, the DHET, the CHE's Higher Education Quality Council and SAQA.

# Identification of Policy Requirements

The PTS development partners were involved with identifying policy development requirements. The process started in In July 2015, when SACE commissioned Class Act to deepen and strengthen the SACE discussion paper on standards through continued consultation with identified role players and through further research:

- A qualitative research approach identified key themes and considerations that emerged from interviewees' perspectives on the proposed professionalisation path and on the research role, as well as on issues raised about SACE's status, role and functions. A desktop review complemented the initial review of the literature.
- SACE conducted a comparative review of the roles and functions of professional bodies in South Africa.

Drawing on the strength of this research, SACE developed two important documents that both focus on enhancing teacher professionalisation:

- Discussion paper (SACE 2016a, currently in second draft)
- Operationalisation document (SACE 2016b, currently in first draft)

The following consultations and interactions further complemented the SACE process of identifying the standards requirements:

- Perspectives on teacher professionalism and accountability were presented at a joint seminar on Teacher Professionalism and Teacher Accountability in Centurion on 18 June 2015 hosted by the Centre for International Teacher Education (CITE), the National Education Collaboration Trust (NECT) and the South African Council for Educators (SACE).
- The empowering role of effective initial teacher education (ITE) teaching practice and performance evaluation against appropriate, collegially set professional development standards was explored at a colloquium that took place in September 2015 at the Soweto Campus of the University of Johannesburg, hosted by the Department of Higher Education and Training (DHET) in partnership with the Education Deans Forum (EDF), SACE, the University of Johannesburg and the Centre for Development and Enterprise (CDE); relevant insights gained from this colloquium were sharpened and applied in a workshop on the role of induction in the teacher professionalisation path. Professor Linda Darling Hammond provided an international perspective on this topic.
- A workshop hosted by SAQA and JET Education Services took place in Centurion in November 2015. A review of the Commonwealth Teacher Professional Standards Framework was presented by JET at the event. Key stakeholders were also given the opportunity to share related work underway in South Africa - this included work by SACE. The workshop presented an opportunity for all the major role-players that have an interest in professional standards to come together. A key outcome of the workshop was the strong consensus to support SACE with the development of professional standards through the establishment of a working group (subsequently renamed as the SACE National Advisory Group (NAG)).

Following these interactions, SACE then embarked on engagement with the teacher unions, NAG meetings, ToC development and the literature and benchmarking. These activities took place in 2016. It is clear that this process involved a wide range of stakeholders and consisted of many different engagements; consultation appeared to be more than adequate

Through the various explorative meeting and consultations, it appears that the goals of the policy were widely accepted and had been identified as an area of need by policy makers in education for a number of years. SACE, being mandated by Parliament, has the authority to develop the PTS and will have authority to regulate registrations (once it receives its credentials as a professional body, a process which is underway) in accordance with these standards.

The change that the standards will bring about is highlighted in the logical framework and follows a predictable path, although the process of mapping out and understanding how the standards will influence or be taken up by stakeholders was quite difficult and took a lot of consultation to pin down.

The existing policies/guidelines/minimum standards relating to professional teaching were crystallised in the diagram below and show the gap that PTS fills in the current standards/policy framework.
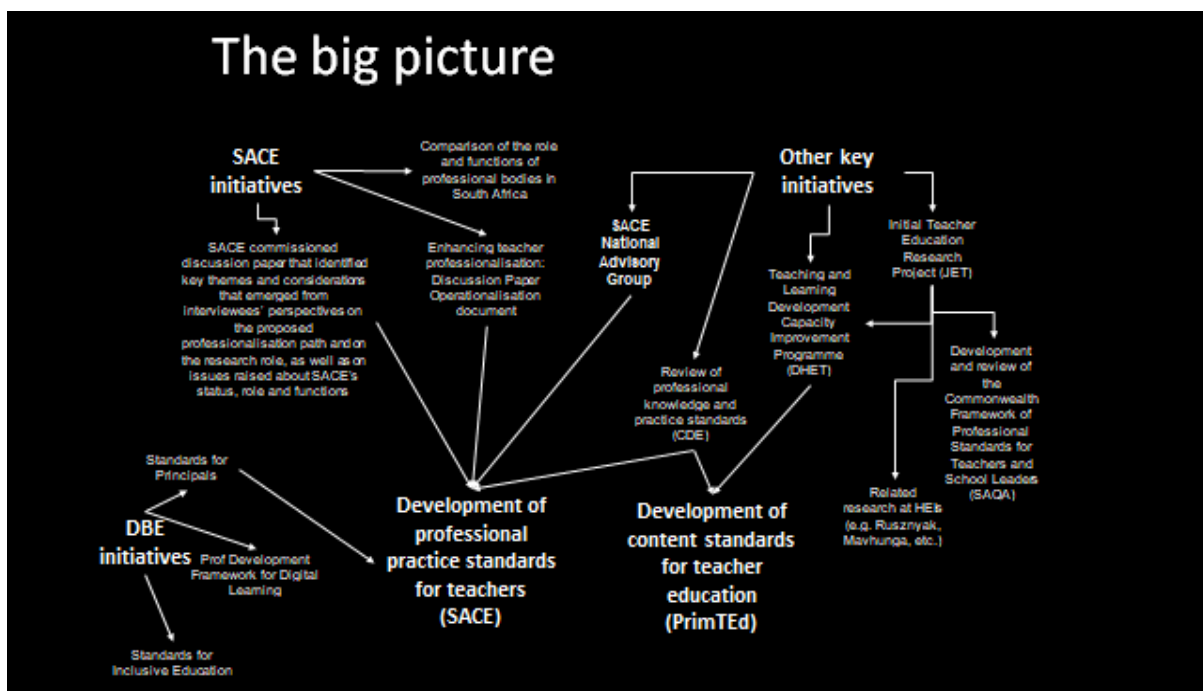


## Identification of the Responsible Policy Developer

SACE is the responsible for the development of these standards and has the authority to submit these standards to the Minister of Education and Parliament for approval. SACE will be responsible for piloting and implementing the standards and will report to the Minister and Parliament on roll out of the standards. This is explained in the partnership terms of reference (ToR) for this project. SACE is also responsible for ensuring compliance monitoring and evaluation and is currently exploring options for how teachers could be evaluated against these standards; some options will be field tested in July 2018.

## Develop a strategy

Policy development steps 4 to 10 focused on the standards drafting process. These sections are presented below.

## Drafting

The drafting of the policy began with a ToC for the policy which is highlighted in Section 2 of this report and defines the problem and goal statements as:

> THE PROBLEM STATEMENT: The quality of teaching in South African classrooms is highly variable, with little shared understanding among teachers regarding what constitutes professional teaching or a professional culture.
>
> THE GOAL STATEMENT: To develop a set of standards for professional teaching that is theoretically informed, values-based, contextually appropriate and widely accepted by stakeholders.

The main outcomes of this logical framework are: **A shared culture of professional teaching is embedded in the South African teaching professions** AND **A consistent set of standards for professional teaching that are used throughout the career of prospective and practicing teachers.** Both these outcomes are realistic and the logical framework clearly articulates how they can be achieved by the standards.

Various stakeholders representing different institutions were involved in the design and drafting of the ToC and the standards. These are positive aspects of the drafting process and in line with the logical framework. Furthermore, all the key processes as outlined in the ToC and the implementation plan were completed in the drafting process and, in fact, more activities and meetings than were planned took place. One of the main issues addressed by the iterations of the draft was ensuring that the document was in line with existing policies and legislation and presented in plain language. The draft seems to have met these requirements. Translating the standards into different South African languages is currently being considered.

## Consultation

The target audience, as described in the communication strategy, included qualified educators, student educators, unions, media, national and provincial education departments, universities, SACE Councillors and staff.

The communication strategy was developed by the three partners during a half-day meeting; external consultant John Arnesen proposed that the 6 Hat approach to communication could be a useful approach. In this approach, each hat represents a type of communication. In the communication strategy meeting, the group identified three of the six hats which suited the PTS development process and which aimed to bring about awareness, understanding and buy-in among the standards developers, implementers and beneficiaries, namely:

- The Yellow Hat signifies positive rationality and is used to look at the positive aspects of a situation or idea, the potential benefits of the suggested course of action and on the parties who are expected to profit from it. It is emphasised that support for the idea should be logically justified and not simply stated without explanation.
- The Green Hat stands for creativity and unconventional thinking. When wearing this hat, people are encouraged to think creatively. Brainstorming, creative thinking tools, lateral thinking and other such methods are used in order to search for unexpected developments of the idea or the discussion.
- The Red Hat symbolises emotions and feelings. While wearing this hat, people are "allowed" to express their feelings about the subject or to share their general mood which might be affecting

their participation or lack of it. This hat does not require logical reasoning or justification, as feelings are almost always subjective rather than rational.

The communication plan indicated that following mechanisms were to be utilised for communicating information: SACE website; radio stations – live slot; D6 Communication; an online questionnaire on Facebook/Google form (used as part of the feedback collection); teacher unions' websites and diaries; the SACE app. While most strategies were implemented, the D6 Communication, radio station slots and the SACE app did not appear to have been used. Given the consultation with 1780 individuals during the process and the generally good attendance rates at all of the SACE PTS development and consultation events, it appears that the strategies that were used were effective.

The communication and advocacy strategy included both internal consultations with other research organisations, education NGOs and partners, reviewers and the NAG. This complemented extensive external consultation with various education departments, policy makers, educators, NGOs, teacher unions and HEIs, etc. Participants were selected on the basis of their positions in the respective organisations as well as for their willingness to be involved and their reputations as experts in the field of education and teacher development.

Overall, participation in both internal and external consultations was fairly good, with the lowest attendance rates being around the 60% level. Record-keeping on attendance at events was very good and will allow follow up with the same individuals if further research needs to be done after the standards are implemented. Sessions were largely well organised and both JET and SACE managed time well, were prepared for all meetings with relevant presentations and handouts were always sufficient and available. The team made use of soft and hard copy documents and shared documents with participants before, during and after meetings and consultations in order to keep participants engaged in the process.

The strategy for recording sessions was a combination of minute-taking, voice- or video-recording, notes on feedback and comments, etc. The one main inconsistency across the various meetings and consultations was thus the way in which the meetings were recorded. At times it was unclear who was taking notes or if notes were being taken at all. There was also little consistency in the way the same kind of meetings was recorded; for example, the four SDWG meetings were not recorded in the same way. The steering committee meetings were the only ones which were recorded consistently in the same way for all ten meetings.

Related to this was the process for obtaining verbal and written feedback from consultations; the process for obtaining feedback was centralised but it did not seem consistent. Written feedback was more centralised and formal; however, it was not clear who was retaining the verbal feedback and questions in the SDWG, provincial and national consultations. The SDWG and the joint meetings were voice-recorded, and two of these five meetings had handwritten notes; however, there did not seem to be any voice-recording of the provincial consultations. If notes were taken by one of the team, the notes were not saved in the project's cloud storage.

During national and provincial consultation sessions, there were opportunities for individual feedback (verbal and written) and discussion group feedback (verbal and written). There were online forms to submit comments on the draft available after the consultations, and email submissions were also permitted. A short online survey which also provided the opportunity for respondents to submit comments per standard was designed using Google forms and posted on the SACE website and social media.

Throughout the various meetings and consultations, the key message from SACE was professionalising the teaching profession through the development of professional practice standards. This was the key

**DEVELOPMENT OF PROFESSIONAL TEACHING STANDARDS 2016-2018**

discussion point in all meetings and remained consistent, largely because facilitators of the meetings and consultations were particularly skilled at sticking to the agenda. This message was fleshed out in the meetings as the ToC, research papers, literature, benchmarking and standards were explored in depth. The purpose of the consultations was to provide opportunities for participants to ask questions, come to understand the content being discussed and provide their insights into possible omissions, misinterpretations, misunderstanding and any other issues with implementation and buy in. Overall, the organisational, planning, management and monitoring issues were well managed and, as such, the meeting outcomes were usually achieved (although at times not fully due to important in-depth discussions being prioritised). The consultations made use of café style interactions, working groups and individual work as well as plenary style engagements, all of which seemed to be suitable and appropriate for the consultations and obtaining as much feedback from participants as possible in limited time.

## Revision

The draft PTS underwent seven iterations before it was released to the public in March. There will most likely be more comments to consider from the gazetting phase, from HEDCOM and from the Minister of Education before the PTS are finalised. The document was circulated for comment to the national and provincial education departments, the attendees of the SDWG and its sub groups, the attendees of the provincial consultations and the general public through City Press. It was also planned to circulate the draft PTS the Minister and various HoDs for comment before being gazetted.

The standards (in different versioning stages) were presented for verbal comment at at least 18 separate events, meetings or workshops to different stakeholders. The partners as well as the expert consultants, along with international reviewers were involved in revising the draft standards in response to stakeholders' and others' comments and contributions.

A document was created to record all the comments received in the various forms and provides evidence that all comments were considered, even if not taken up; the document records whether a comment was accepted, rejected or partially addressed in the revised document. It also indicates how conflicting comments were managed and the rationale for why a particular comment was accepted or rejected.

## Endorsement

The process for endorsing the draft involved submission to PRODCO and then HEDCOM before the submission of the draft to the Minster for comments and support. The endorsing committee is the PRODCO structure at SACE as well as the steering committee and the NAG who represent various institutions. All these organisation and individuals have access to the draft of the standards as well the drafter notes which show amendments made and recorded reasons for not making amendments and the committee will engage with this information before the draft is finalised. This is a process which is currently underway

## Quality Control

An external peer review process was put in place in order to ensure the rigour of the final draft of the PTS documentation process. Two recognised international experts were engaged to provide an independent view of the process, in particular:

- The international comparability of the process followed, considering best practices used elsewhere;
- The content of the emerging professional practice standards, considering best practices used elsewhere; and

- The relationship between professional practice standards for teachers and subject/content standards for teacher education.

A modest honorarium for the reviewers was made available and all travel and related expenses were covered by the project partners. Part of the duties leading up to the review of the standards included two days spent with the SACE/JET experts in South Africa during the standards development process; this included engagement with selected stakeholders and participants. The reviewers were asked to also provide observations at the end of the process based on a desktop review of the final professional practice standards. The findings of their review report will be shared when the process is concluded and will be reported on in the M&E report for the next phase.

The final process to ensure compliance with requirements (against ToC, literature review, benchmarking, ToR, other policies etc.) and to check for consistency in terms of presentation, language and formatting will be concluded before submission for approval. The copy editor at JET is involved in this process which is currently underway.

## Approval

SACE, as the developer of the standards, is responsible for gazetting the draft standards for comment; thereafter, the standards will be submitted to the Minister of Education and then to Parliament for comment, review and approval before being adopted by SACE and piloted. The policy went through the final processes of consultation, commenting and gazetting in April and is due for submission to the Minister on 30th April 2018.

**2. Teachers collaborate with others to support teaching, learning and their professional development.**

2.1. The wellbeing of children and their learning requires collaboration between teachers, parents or guardians, school-based colleagues and other professionals in the community.

2.2. Teachers involve themselves in ongoing personal, academic and professional growth through reflection, reading, study, research, and participation in professional development activities.

2.3. Teachers provide supportive environments for the induction and mentoring of colleagues who are new to their school, as well as pre-service and newly-qualified teachers.

2.4. Teachers participate in professional development activities organised by their subject associations, professional learning communities (PLCs) and teacher unions.

2.5. Teachers conduct themselves in ways that earn the respect of those in the community and uphold the dignity of the teaching profession.

2.6. Teachers involve themselves in educational debates and provide thoughtful comment on educational issues that affect them.

**3. Teachers understand that language plays an important role in teaching and learning.**

3.1. Teachers make appropriate use of the language of learning and teaching (LoLT), and where necessary, draw on other languages to clarify learners' understanding of important concepts.

3.2. Teachers introduce learners to the specialist terminology of their subject/s.

3.3. Teachers provide learners with ongoing opportunities to decode, interpret, and critique different kinds of written, graphical and visual texts.

3.4. Teachers create opportunities for learners to develop their reading and writing skills in the lessons they teach.

**4. Teachers promote social justice and the redress of inequalities within their educational institutions and society more broadly.**

4.1. Teachers are committed to affording every learner equitable and high quality learning opportunities.

4.2. Teachers have a moral responsibility to identify, confront and resist the marginalisation and exclusion of learners from accessing quality learning opportunities.

**7. Teachers understand how their subjects are best taught and learnt.**

7.1. Teachers present subject knowledge to learners in a conceptually sound manner.

7.2. Teachers devise tasks that give learners opportunities to practise and master new knowledge and skills.

7.3. Teachers learn to anticipate what learners find difficult to understand and develop effective ways to address common misunderstandings.

7.4. Teachers access, develop and modify teaching and learning resources available within and beyond their school contexts.

7.5. Teachers use carefully chosen physical, graphic, digital and text-based resources that enhance learners' access to knowledge.

7.6. Teachers use a variety of teaching and assessment strategies to promote learning for all.

**8. Teachers interpret the national curriculum to plan systematic sequences of lessons.**

8.1. Teachers use their knowledge of their subject and the curriculum to plan purposeful and coherent lessons.

8.2. Teachers connect the concepts they teach to what learners already know, and build a foundation for what they will learn subsequently.

**9. Teaching involves organising, monitoring and assessing learning.**

9.1. Teachers use assessment tasks that give learners opportunities to show what they have learnt, and what they can do with that knowledge

9.2. Teachers provide learners with feedback that helps them understand what they have done correctly, where they have made mistakes, and how they can improve their work.

9.3. Teachers use learner errors as important data for understanding what learners misunderstand, and for thinking about ways to improve their teaching.

9.4. Teachers keep accurate records that reflect learner achievement, and can report to stakeholders on the progress of learners.

**5. Teachers make judgments that are conceptually informed, responsive to learners and contextually appropriate.**

5.1. Teachers seek to understand the relationship between theory, research and their classroom practices.

5.2. Teachers can justify the teaching choices they make about lesson planning, delivery and assessment to themselves and to other stakeholders.

5.3. Teachers reflect on their classroom experiences and use learner performances to think about ways to improve their teaching.

**1. Ethical teaching is based on a commitment to the learning and wellbeing of all children.**

1.1. Teachers hold high expectations of all learners' capacity to learn, work hard, and achieve success.

1.2. Teachers understand how children develop and learn.

1.3. Teachers understand the different challenges that confront learners and their families, and consider how these issues may affect their learning.

1.4. Teachers respect different aspects of learners' identities, and regard diversity as a strength and resource for teaching and learning.

**PROFESSIONAL TEACHING...**

**...IN OUR HANDS**

**6. Teaching is based on teachers' deep understanding of the subject/s they teach.**

6.1. Teachers understand the structure and the concepts that make up the subjects they teach. They understand how these concepts are connected.

6.2. Teachers know how to use skills to create and verify knowledge in the subject/s they teach.

6.3. Teachers understand how concepts in their subjects can be used to address real world issues.

6.4. Teachers keep themselves informed of new developments in their subjects.

**10. Teaching requires that well managed learning environments are created and maintained.**

10.1. Teachers are in class and teaching during scheduled teaching time.

10.2. Teachers establish classroom routines to maximise teaching and learning time.

10.3. Teachers use fair and consistently applied rules to promote respectful behaviour with all members of the school community.

\* The Draft Professional Teaching Standards are currently available in English. The final version will be published in English, isiZulu, Afrikaans and Sepedi.

**Professional Teaching Standards - DRAFT FOR CONSULTATION WITH TEACHERS & SUBJECT AND PHASE SPECIALISTS**

SACE

# Annexure 3: Draft 0 of the Professional Teaching Standards (prepared for consideration and gazetting by SACE)

**INTRODUCTION: PROFESSIONAL TEACHING STANDARDS FOR SOUTH AFRICA**

(DRAFT 0, 19 May 2018)

In this document, the South African Council for Educators (SACE) presents a draft set of national *Professional Teaching Standards* that seeks to promote professional teaching practice and embed a strong professional teaching culture in South Africa.

Teachers and their teaching are the biggest influences on student learning. For this reason, committed, knowledgeable and skilful educators are among the country's greatest assets. However, the South African education system is marred by low learning achievement, persistent inequality, high learner drop-out rates, and variable teaching quality. Moreover, there is little agreement between the country's educators about what makes professional teaching practice and a professional school culture. There is therefore an urgent need for professional standards to inform and strengthen the teaching profession and enhance the quality of education for all the country's learners.

SACE is tasked to uphold the quality of the teaching profession. According to Act 31 of 2000, SACE is mandated to set and maintain ethical and professional standards for educators, and advise the Minister of Basic Education and the Minister of Higher Education and Training on the following:

- the minimum requirements for entry to all levels of the profession;
- the standards for programmes of pre-service and in-service educator education;
- the requirements for promotion within the education system; and
- educator professionalism.

In line with its mandate, in late 2016 SACE set up a Standards Development Working Group of representatives of all key stakeholders:

education departments, statutory bodies, teacher unions and associations, independent schools, teacher educators, academics, educators and researchers to develop professional standards for educators.

The result is 10 proposed professional teaching standards (PTSs) that outline what is expected of educators in terms of their ethical and professional teaching practices. They describe in broad terms what an educator must know and be able to do to provide quality learning opportunities for all learners they teach in the context of South African schools.

The PTSs comprise the standards expected of all pre-service and in-service teachers across all phases, subject specialisations, job descriptions and institutions. However, they are to be interpreted in the context, role and career stage of each individual educator.

While each Standard represents a different aspect of ethical and professional practice, there are many relationships within and between the PTSs. Teaching is complex work in which educators have to draw on different knowledge and skills to decide how best to create suitable learning opportunities for their learners, often in very challenging contexts. Teachers are expected to make wise decisions in situations that are often unpredictable, and to always be guided by a moral commitment to act in the best educational interests of their learners.

## PURPOSE OF THE PTSs

The aim of the PTSs is to establish a set of standards for professional teaching and conduct that is theoretically informed, values based, appropriate to the South African context, and widely accepted by stakeholders.

It is intended that the PTSs will fulfil the following purposes:

- Promote a common set of knowledge, skills and commitments across the profession to enhance the learning opportunities of all learners.
- Establish the professional identity and enhance the status and public standing of the teaching profession.
- Provide a common language and a vision of the profession that all teachers can use to define and develop their practice.

- Support professional teachers to fulfil their professional roles and responsibilities, from pre-service to expert teacher.
- Set standards for the providers of teacher education so that their programmes are designed and delivered in a way that enables all pre-service and in-service educators to meet the standards.
- Provide a framework to guide the whole continuum of educator preparation and development from student selection, pre-service education, provisional registration of newly-qualified teachers, induction, full registration, educator evaluation, professional development and career advancement.
- Facilitate self-evaluation, reflection and professional development of educators at all career stages.
- Guide educators to deepen and broaden their professional knowledge, skill and understanding as they gain in experience.

The roll-out and implementation of the PTSs will be finalised by SACE, and will start with the provisional registration of newly-qualified teachers. They will then be phased in for in-service teachers.

## THE STANDARDS DEVELOPMENT PROCESS

The 10 proposed Standards were developed after 18 months of research, conceptualisation, discussion, drafting and consultation of key stakeholders. The conceptualisation of the PTSs was informed by an extensive international literature review of professional standards conducted by JET Education Services for the Centre for Development and Enterprise, by lessons from other national and international professional councils, teacher professionalisation research conducted by SACE, as well as collaboration with other standards-setting processes of the Department of Higher Education and Training (DHET) and the Department of Basic Education (DBE).

The collaborative development process involved SACE, JET Education Services, the Zenex Foundation and representatives of all key stakeholders: five teacher unions, the ETDP-SETA, the ELRC, Faculties of Education at HEIs, SAPA, SGBs, independent schools, provincial education departments, DBE ITE and DHET, educators, and policy researchers.

In addition to the work and meetings of the SDWG in developing the proposed PTSs, the following consultative processes were undertaken:

- Across all nine provinces consultations were conducted from October 2017 to January 2018. These involved 382 delegates.
- Additional presentations of the PTSs were conducted as part of a Continuing Professional Teacher Development Seminar Series. These involved 1,265 SMT members in four provinces between February and March 2018.

A process of wider consultation and field testing of the PTSs will now be undertaken because it is critical that the final PTSs are widely known and accepted by in-service educators and other key stakeholders, and that they are simple to implement.

Thus, to obtain feedback on the proposed PTSs from practicing educators and other stakeholders in all parts of the South African education system, SACE has gazetted them for public comment. All comments received will be carefully considered and used to refine and strengthen the draft PTSs.

For this purpose, a Reference Group will be set up by SACE to review all the public comments and facilitate the finalisation of the PTSs. SACE is thus calling for nominations from all stakeholder groups for candidates to make up the Reference Group.

After a final version of the PTSs is produced, they will be submitted to SACE, as well as to the relevant government departments and statutory bodies for formal consideration and approval.

**PROFESSIONAL TEACHING STANDARDS**

The Professional Teaching Standards for South African teachers consist of 10 Standards grouped into three domains: Professional Engagement, Professional Knowledge and Professional Practice, all of which are necessary and interlinked components of quality teaching and ethical conduct:

*Professional Engagement* involves educators demonstrating caring, respect and professionalism in all their interactions with learners, colleagues, parents/carers and the community, and maintaining positive, collaborative relationships. Educators need to be sensitive to the needs of all learners and committed to ensuring their best interests are served. They reflect on their practice and

expand their professional learning, both alongside colleagues and individually.

*Professional Knowledge* refers to a body of professional knowledge educators draw on to respond to the needs of their learners within their educational contexts.

*Professional Practice* involves educators acquiring and using a range of effective teaching strategies to implement well-designed learning opportunities that support learning gains for all learners.

The three domains listed above are open to further scrutiny. Members of the technical working group that worked on the Standards were not unanimous in the selection of the three domains.

Each of the 10 PTSs include focus areas which explain what needs to be demonstrated to meet the standard.

## *PROFESSIONAL ENGAGEMENT*

1. **Teaching is based on an ethical commitment to the learning and wellbeing of all learners.**

   1.1. Teachers believe in the capacity of all learners to achieve and make progress both inside and outside the classroom.
   1.2. Teachers understand the different challenges that confront learners and their families and consider how these challenges may affect their behaviour and learning.
   1.3. Teachers respect different aspects of learners' identities (including gender, race, language, culture, sexual orientation and dis/ability), and believe that these diversities can be a strength and resource for teaching and learning.

2. **Teachers collaborate with others to support teaching, learning and their professional development.**

   2.1. Teachers conduct themselves in ways that earn the respect of those in their communities and uphold the dignity of the teaching profession.

2.2. Teachers understand that the wellbeing of learners and the support of their learning requires communication and collaboration between teachers, parents, caregivers, other professionals, and the community.

2.3. Teachers are responsible for their ongoing personal, academic and professional growth through reflection, study, reading, and research.

2.4. Teachers participate in endorsed continuing professional teacher development activities/programmes organised by their subject associations, professional learning communities (PLCs), higher education institutions, teacher unions and private providers.

2.5. Teachers provide supportive environments for the induction and mentoring of colleagues who are new to their school, as well as for pre-service and newly-qualified teachers.

2.6. Teachers actively involve themselves in educational debates, curriculum development initiatives, and educational issues that affect them.

3. **Teachers support social justice and the redress of inequalities within their educational institutions and society more broadly.**

3.1. Teachers are committed to ensuring that learners are given the support they need for equitable access to learning opportunities.

3.2. Teachers have a responsibility to identify and challenge policies and practices that discriminate against, marginalise or exclude learners.

4. **Teaching requires that well-managed and safe learning environments are created and maintained.**

4.1. Teachers are in class and teaching during scheduled teaching time.

4.2. Teachers establish classroom routines to make the most of the available teaching and learning time.

4.3. Teachers use fair and consistently-applied rules to promote respectful behaviour in their working environments.

## *PROFESSIONAL KNOWLEDGE*

5. **Teaching is fundamentally connected to teachers' understanding of the subject/s they teach.**

    5.1.  Teachers understand the subjects they teach as bodies of knowledge in which important concepts are connected to one another.
    5.2.  Teachers understand how knowledge is produced and verified in the subject/s they teach.
    5.3.  Teachers understand how subject knowledge can be applied to interpret and address real-world issues.
    5.4.  Teachers keep themselves informed of new developments and research in their subject/s.

6. **Teachers make thoughtful choices about their teaching that lead to learning gains for all learners.**

    6.1.  Teachers consider how learners develop and learn when choosing teaching and learning strategies.
    6.2.  Teachers seek to understand how theoretical concepts and evidence-based research can inform the choices they make in their classroom practices.
    6.3.  Teachers can account for the design, delivery and assessment of lessons to themselves, their colleagues and to other stakeholders.
    6.4.  Teachers improve their teaching by reflecting on what has worked and what has not worked in the learning experiences they have created.

7. **Teachers understand that language plays an important role in teaching and learning.**

    7.1.  Teachers create opportunities for learners to develop their vocabulary, their command of the Language of Learning and Teaching (LoLT), and to develop their reading and writing skills in the lessons they teach.

7.2. Teachers draw on other languages, when necessary, to enhance learners' understanding of the important concepts in their lessons.

7.3. Teachers enable learners to understand and use the specialist terminology and language of their subject/s.

7.4. Teachers provide learners with ongoing opportunities to read, interpret, and respond to different kinds of written, graphical and visual texts.

7.5. Teachers recognise that all learners need to acquire and hone foundational skills in language and numeracy, and that there is a strong interrelationship between language and numeracy.

## *PROFESSIONAL PRACTICE*

### 8. Teachers are able to plan coherent sequences of learning experiences.

8.1. Teachers use the national curriculum to identify what learners are required to know and do.

8.2. Teachers use the national curriculum and knowledge of their subject/s to understand how important ideas and skills are built up across different years of learning.

8.3. Teachers base their planning on what learners know and understand in order to design coherent units of lessons with meaningful learning activities and assessments.

### 9. Teachers understand how their subjects are taught and learnt effectively.

9.1. Teachers explain content knowledge to learners in ways that are understandable and accurate.

9.2. Teachers devise tasks that give learners opportunities to consolidate new knowledge learnt and to practise skills.

9.3. Teachers learn to anticipate what learners will find difficult to understand and develop effective ways to address common misunderstandings.

9.4. Teachers find, develop or modify carefully chosen physical, graphic, digital and text-based resources to enhance learning.

9.5. Teachers engage their learners to stimulate their curiosity about a subject and motivate them to learn more.

## 10. Teaching involves monitoring and assessing learning.

10.1. Teachers use assessment tasks that give learners opportunities to show what they have learnt, and what they can do with that knowledge.

10.2. Teachers provide learners with constructive feedback that helps them understand what they have done correctly, where they have made mistakes, and how they can improve their work.

10.3. Teachers analyse learner contributions, their questions and their errors as important data that shows what the learners do and do not yet understand.

10.4. Teachers keep accurate records of assessments that track learner achievement and can report to stakeholders on the progress of learners.