

Implementation of the Integrated Quality Management System and Educators' Perceptions, Concerns and Dispositions on Their Career Stages

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ABSTRACT This paper argues that educators' career stages account for variations in the educators' perceptions, concerns and dispositions towards the Integrated Quality Management System (IQMS) in South African schools. These variations have a bearing on the implementation of IQMS. The presented results are extracted from a larger study and are based on a survey of 305 educators. Three null hypotheses, one each, on the significant differences in educators' perceptions of IQMS, their concerns about IQMS, and their dispositions towards IQMS were tested, using educators' career stages as a sorting variable. The Kruskal Wallis test was employed for the purposes of gauging significant differences. This research concludes that there were significant differences between educators' perceptions and dispositions. However, the educators' concerns about IQMS did not differ, but were shared by educators across career stages. Only in the 'collaboration concern' did career stages differ. The potential impact of these variables on the implementation of IQMS, and the need to bargain for educators' career stages in the implementation of IQMS, and other school policies and programmes, are highlighted. This study generated data that could be generalised to 3370 school educators in one Education district of one Province in South Africa. Similar studies in other districts in the province and nationally will generate a good feedback from educators. Reviews based on empirical data are pertinent for the success of the policies and for feedback to guide new policies. This paper makes recommendations for policy formulators, programme administrators, as well as further research. Internationally too, gathering of similar data from educators, when policies are being implemented, will be useful to receive robust feedback.

1. INTRODUCTION

The quest for quality in education, particularly in the secondary schooling sector, gave the impetus for the development of the Integrated Quality Management System (IQMS). Between 1985 and 1990, there was a decline in the culture of teaching and learning in the majority of schools in South Africa. Turmoil and unrest in the township schools made things difficult for subject advisors and school inspectors to visit schools and the post-1994 Department of Education (DoE) of the new democratic dispensation felt the need to develop an appraisal instrument which would be acceptable to all stakeholders (ELRC 2003). The DoE hoped that the appraisal instrument would enhance the development of competencies of educators, and help improve the quality of public education in

South Africa. Following intense bargaining, agreements were reached within the Education Labour Relations Council (ELRC) on the implementation of the Developmental Appraisal for Educators (1998), in which educator formations, provincial departments, and the National Department of Education were involved.

The demise of the developmental appraisal gave the impetus for the development of the IQMS. An agreement was reached in the ELRC (Resolution 8 of 2003) to integrate all the existing programmes on quality management in education. The existing programmes were the Developmental Appraisal System (DAS) that came into being on 28 July 1998 (Resolution 4 of 1998), Performance Measurement (PM) system (2003) and Whole School Evaluation (WSE: Resolution 1 of 2003). The purpose of DAS was to determine areas of strengths and weaknesses in the performance of educators so as to inform in-service training (INSET) and subject advisory services. DAS was established for the professional development of individual educators. The purpose of PM was to evaluate individual educators for salary progression, grade progression, and confirmation of appointments, rewards and

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incentives. The purpose of WSE was to evaluate the overall effectiveness of the school as well as the quality of teaching and learning.

The ELRC's (2003) IQMS training manual for provincial teams indicated that the purposes of IQMS were to: (a) identify needs of educators for support and development; (b) To provide support for continued growth; (c) promote accountability; (d) monitor an institution's overall effectiveness; and, (e) evaluate educators' performance.

Clearly, the IQMS is the combination of both the accountability and professional development purposes and goals. Evans and Tomlinson (1989) point out that the nature and effectiveness of educator evaluations depend on the recognition of the fact that there is an irreconcilable conflict between a scheme based on accountability and one whose purpose is professional development. With the integration of accountability and professional development in the IQMS policy, it can be argued that there was bound to be overemphasis on one paradigm at the expense of the other. The researchers acknowledge that the contradiction and conflict between accountability and professional development plays out and explain variations in educators' perceptions, concerns and dispositions towards IQMS, and thus undermining its implementation.

Whilst recognising the tension within the IQMS policy, the focus of this research is whether educators' career stages have a bearing on their responses and reactions to policies and programmes. The question is whether career stages matter in the explanation of variations in educators' perceptions, concerns and dispositions towards IQMS. For this study, the researchers hypothesised that patterns in educators' interpretations, concerns and dispositions towards IQMS would emerge when these variables are connected to the educators' positions within particular career stages. Career stage is measured as years of experience (Drake 2002) and is a useful measure for understanding the influence of career development on the interpretations and implementation of school change programmes across a large number of educators. Although there is considerable literature on career stages, specifically for educators (Huberman 1993; Drake 2002; Scott 2003; McCormick and Barnett 2006), career stage as an indicator of development and educators' re-

sponses to school reforms or school change within the South African context, that is, schools and classrooms, and particularly in relation to the IQMS, is yet to be studied.

Research on educators' career stages (Huberman 1993; Drake 2002; Scott 2003) shows that career development can be divided into several stages. These stages are defined by educators' years of experience, and are explained by qualitatively different sets of attitudes, beliefs and behaviours (Huberman 1993). In order to study educators' responses to new school policies and programmes, Burke (1985) set out to study patterns of educators' attitudes at various stages of their careers. His study revealed that there were certain concerns or pre-occupations that were characteristic of each career stage. These concerns ranged from survival, adjustment, security, work relationships, public attitude and pressure, instructional management, professional development, etc. Drake (2002) also found that there were significant differences among career stage groups in their responses to the mathematics education reform. The results of his research show that Californian educators differed in their attitudes toward reform, their understandings of reform, their perceived preparation for teaching according to the reform principles and their practices. With regard to dispositions, early career and mid-career educators were more positive about the reforms than late-career educators.

Burke (1985) argues that these categories of career stage related concerns should help administrators design professional development programmes that fit the individual needs of educators. This research by Burke (1985) also advances the argument of this research that educators' career stages inform, influence and shape educators' perceptions, concerns, and their dispositions to act on the IQMS policy and programme. Different researchers vary on the precise number and definition of the career stages. McCormick and Barnett (2006) identify four stages on the basis of the approximate years of teaching. These stages are, namely: exploration, establishment, maintenance and disengagement. The authors, however, emphasise that educators do not necessarily proceed through these stages linearly. Huberman (1993) identifies six stages, namely: career entry, stabilisation, diversification and change, stocktaking and interrogations at mid-career, serenity and affec-

tive distance, conservatism and disengagement. The works of these authors (Burk 1985; Huberman 1993; McCormick and Barnett 2006) have been adopted and adapted for the analysis and interpretation of educators' career stages in relation to the IQMS. The summary and synthesis of these two models produced the five career stages outlined below, which formed part of the survey on educators' career stages, perceptions, concerns and dispositions towards IQMS. They are the following:

- (i) *Career Entry*: educators are committed and exploring new possibilities offered by teaching,
- (ii) *Stabilisation*: educators feel content and comfortable with their teaching practices,
- (iii) *Diversification*: educators contemplate diversification and change of career,
- (iv) *Conservatism*: educators are conservative or less flexible about their teaching practices, and stick to what they know works best for them in the classroom,
- (v) *Disengagement*: educators are disengaged, withdrawn and less interested in school activities.

These five career stages outlined above formed the basis for the formulation of the five career stages items of the survey used for the purposes of data collection. It is imperative that educational policy and programme implementation should view educators' professional development, that is, in-service and professional growth opportunities made available to educators, in the light of their career cycle phase. The career stages theory is based on the assumption that the needs of the beginning or novice educator in the induction phase differs from that of an experienced educator who has reached the enthusiastic and growing stage, or has entered the stable and stagnant phase (Drake 2002). Educators of different career stages have different attitudes, knowledge, skills, and behaviours at various points during their career. As a result, if educator evaluations, such as IQMS are to motivate educators to seek continual growth and improve on the quality of their teaching, then a provision should be made for the consideration of personalised and individualised reactions and responses of educators in the implementation of such educator evaluation programmes. In view of career stages and educators' responses to policies, programmes and school reforms, a research question was formulated with respect

to educators' career stages and their responses to IQMS.

The contents of this paper are extracted from a larger study by the authors and are based on a survey of 305 educators in one education district in the Eastern Cape Province of South Africa.

1.1 Research Question

Are there any significant differences in educators' perceptions, concerns and dispositions towards IQMS in relation to educators' career stages? In order to provide answers to the research question above, the following null hypotheses were formulated and tested.

1.2 Null Hypotheses

- 1.2.1 *There will be no significant differences between educators' career stages and their perceptions of IQMS;*
- 1.2.2 *There will be no significant differences between educators' career stages and their concerns about IQMS.*
- 1.2.3 *There will be no significant differences between educators' career stages and their dispositions towards IQMS.*

2. RESEARCH DESIGN AND METHODOLOGY

2.1 Research Design

This research surveyed the perceptions, concerns and dispositions of educators towards IQMS in relation to educators' career stages, and then looked into the significant differences from the deductive analysis of the data thus obtained. Cohen et al. (2007) argue that surveys are useful for gathering data on attitudes and preferences, beliefs and predictions, behaviours and experiences – both past and present. In this particular research, survey research design was employed for analytical purposes to provide inferential and explanatory information which was used to support or refute hypotheses about educators' career stages, perceptions, concerns and dispositions towards IQMS. The limitation of this research design lies on the fact that educators' perceptions are not looked at in-depth, but are inferred from their agreement or disagreement with the statements on the purposes and goals of IQMS.

2.2 Sample

A cluster sample of 305 educators in a range of public schools was drawn from the population of about 3370 educators in schools in one Education district of the Eastern Cape Province. Though the sample was 9 % of the population of public school educators in the district, the large sample size of 305 had enough statistical power to show all the effects and to reduce sampling error. Struwig and Stead (2001: 119) maintain that sample sizes of 150 to 200 can provide an acceptable reflection of the population. The sample was constituted by educators in the Foundation, Intermediate, Senior, and Further Education and Training phases of the secondary schooling system in one Education district. The schools were selected by convenience or ease of access, and then all of the willing educators in each school were selected for inclusion in the sample. An attempt was made to collect data in all the 15 circuits (clusters) of the education district. Circuits are geographically defined clusters of schools within the district. In cluster sampling the researcher selects subjects from convenient, naturally occurring group units such as schools, districts, circuits or regions (McMillan and Schumacher 1993). The purpose of using cluster sampling was to ensure that all the characteristics of educators in the education district are represented in the sample. The advantage of cluster sampling is that it yields the lowest field costs, ensures that the targeted population is fairly represented, and can estimate characteristics of clusters as well as the population (Struwig and Stead 2001). Since cluster sampling is probabilistic, fair representation of the population from which the sample is drawn is ensured. Thus, the results of this sample can be generalised to the Education District where the study was carried out.

2.3 Questionnaire

A closed questionnaire with statements and fixed format responses was compiled for the purposes of collecting data. The questionnaire comprised of the following sections, namely: educators' career stages, perceptions of IQMS, concerns about IQMS, and dispositions towards IQMS. The section on educators' career stages formed the basis for the evaluation of perceptions, concerns and dispositions towards IQMS.

A nominal scale of 1 to 5 was used to distinguish between the various career stages of educators. The section on educators' perceptions of IQMS consisted of nine statements relating to the various ways in which IQMS can be perceived in terms of its purposes, goals and objectives as stated in the IQMS manual for educators, and also in literature on quality management systems in schools. It attempted to establish educators' differing weightings and emphases from the way in which the purposes and goals of IQMS have been conceived by educators depending on educators' career stages. A four-point ordinal scale was used to elicit the extent of agreement or disagreement with each of the purposes and goals of IQMS presented in the questionnaire. Agreement or disagreement with each of the purposes and goals of IQMS indicated educators' understandings or misunderstandings, interpretations or misinterpretations, perceptions or misperceptions of IQMS.

Questionnaire items on concerns about IQMS related to educators' involvement or potential involvement with IQMS. This section consisted of statements which sought to reveal the preoccupations that reflected on an educator's mind about IQMS. These statements related to the following categories of concerns, namely: awareness, informational, personal, management, consequence, collaboration and refocusing (Lieberman and Miller 1991). The response category consisted of 1 denoting "true" and 2 denoting "untrue". The items for the section on educators' dispositions consisted of three statements relating to educators' desire to participate in IQMS activities, willingness to participate in IQMS activities and the level of enthusiasm about IQMS policy and its practices. A four-point ordinal scale was used to gauge educators' dispositions towards IQMS. It was felt that a four-point scale would encourage respondents to take a stand for or against IQMS.

2.4 Data Analysis

For significant differences in educators' perceptions, concerns and dispositions towards IQMS on the basis of career stages (see the null hypotheses), the Kruskal-Wallis tests (non-parametric tests) for independent group comparisons were used. The Kruskal-Wallis non-parametric test for independent group comparisons was used to test whether there were any significant

differences in educators' perceptions, concerns and dispositions towards IQMS. The educators' career stages were used as sorting or grouping variables.

The Kruskal-Wallis test is a non-parametric test which is an alternative to One-way ANOVA (a test of significant differences). This test is used when the assumption of normality or equality of variance is not met. Like many other non-parametric tests, the Kruskal-Wallis test uses the ranks of the data (nominal and ordinal scale) rather than raw scores (interval scale) (Struwig and Stead 2001). The researchers decided to use the Kruskal-Wallis test instead of the Chi-square because preliminary analyses using cross tabulations showed that some cells (groups, that is, career stages) had an expected count of less than 5. Thus, the assumption of using the chi-square test was not satisfied. The SPSS (2004:5 – 11) manual warns that cells with less than 5 expected frequencies contribute to a loss of sensitivity in the analysis and might invalidate the results. In the interpretation of the results, significant levels below 0.05 indicated that groups or categories (career stages) differed with respect to the variable under consideration.

Formal approvals from Walter Sisulu University, the Eastern Cape Department of Education and all school Principals were obtained in order to conduct this research. A research information sheet and an 'informed consent' form were given to all members of the sample. The research participants completed the informed consent form after the purpose of the study was explained to them. The research was conducted in a way where it did not interfere with teaching and learning in the schools.

3. RESULTS

3.1 Significant Differences between Educators' Career Stages and Their Perceptions of IQMS

The hypothesis that "there are significant differences in educators' career stages and educators' perceptions of IQMS" was found to be true for most of the perceptions items. There were significant differences between educators' career stages and educators' perceptions of the following purposes and goals of IQMS, namely: IQMS as a means of monitoring educators' work ($\chi^2 = 12.82$; $df = 4$; $p = 0.012$); IQMS enhances professional development ($\chi^2 = 18.99$; $df = 4$; $p = 0.001$); IQMS is a tool for needs assessment of educators ($\chi^2 = 13.33$; $df = 4$; $p = 0.010$); IQMS scores facilitate salary progression ($\chi^2 = 12.95$; $df = 4$; $p = 0.012$); IQMS facilitates improvement in the quality of teaching ($\chi^2 = 20.51$; $df = 4$; $p < 0.001$); IQMS informs subject advisory and IN-SET ($\chi^2 = 13.76$; $df = 4$; $p = 0.008$); and IQMS is one of the means of effecting promotions ($\chi^2 = 12.75$; $df = 4$; $p = 0.013$). The differences are explained by greater within group variation in the responses, and a number of outliers manifested in educators contemplating diversification and career change (career stage 3). The attitudes, beliefs and behaviours of the disengaged, withdrawn and less interested educators (career stage 5) also accounted for these significant differences. However, the hypothesis that "there are significant differences between educators' career stages and educators' perceptions of IQMS" was refuted in the following perceptions items, namely: IQMS as a means of effecting disciplinary measures ($\chi^2 = 5.11$; $df = 4$; $p = 0.276$), and IQMS as a means of getting educators to account for their performance ($\chi^2 = 0.76$; $df = 4$; $p = 0.944$). Thus, the perceptions of these IQMS purposes and goals were similar for the majority of educators across different career states. Therefore, educators across career stages shared the same views about whether IQMS is the means for accountability and a disciplinary mechanism.

3.2 Significant Differences between Educators' Career Stages and Their Concerns about IQMS

The following concerns were not significantly different across educators of different career stages, namely: concern with limited knowledge about IQMS ($\chi^2 = 7.04$; $df = 4$; $p = 0.134$); limited time for IQMS ($\chi^2 = 3.46$; $df = 4$; $p = 0.485$); inability to manage all IQMS requirements ($\chi^2 = 5.56$; $df = 4$; $p = 0.235$); availability of resources for IQMS implementation ($\chi^2 = 8.79$; $df = 4$; $p = 0.067$); and how IQMS affects educators ($\chi^2 = 2.57$; $df = 4$; $p = 0.632$). These results show that the above concerns were experienced by the majority of educators as true in all the five career stages. Thus, the hypothesis that "there are significant differences between educators' career stages and educators' concerns" did not hold for the above mentioned concerns, and was thus rejected. There were however, significant differences between educators' career

stages and the educators' concern with the possibility of using IQMS for professional development ($F = 9.42$; $df = 4$; $p = 0.052$). Thus, the hypothesis that "there are significant differences between educators' career stages and educators' concerns" was found true for this particular collaboration concern item.

3.3 Significant Differences between Educators' Career Stages and Their Dispositions towards IQMS

The hypothesis that "there are significant differences in educators' career stages and educators' dispositions towards IQMS" was found to be true for all of the disposition items. As shown in the results below, there were significant differences between educators' career stages and the following dispositions, namely: educators' desire to participate in IQMS ($F = 10.13$; $df = 4$; $p = 0.038$); educators' willingness to participate in IQMS ($F = 22.27$; $df = 4$; $p < 0.000$); and educators' enthusiasm about IQMS ($F = 22.36$; $df = 4$; $p < 0.000$). The differences are explained by the number of outliers manifested in career entry (career stage 1) and the content and comfortable educators (career stage 2). There was also greater within group variation in educators contemplating diversification and career change (career stage 3). The attitudes, beliefs and behaviours of the disengaged, withdrawn and less interested educators (career stage 5) also accounted for these significant differences in educators' dispositions.

4. DISCUSSION

The study of perceptions and their bearing on the implementation of school policies and programmes is meant to emphasise the importance of sense making and interpretation by the individual implementers (educators) of different career states in the implementation process. Significant differences in educators' perceptions are explained by Huberman (see Fullan 1992). He argues that the phenomenological world of school reform implementers differs. As a result, educators' responses to policy, programme or innovation differs. The differences in the way in which the universes are perceived, explains why policy and programme objectives believed important in one are viewed trivial in another, and

also why perceptions differ across educators of different career states.

Educators' thoughts and meanings should be taken seriously and bargained in the implementation of IQMS. Fullan (1992) asserts that perceptions tend to "determine the actions, or inactions, that follow." Therefore, it can be argued that variations in perceptions of IQMS purposes and goals will tend to result in variations in the actions of educators implementing IQMS. For this reason, there is a need for IQMS programme administrators, and facilitators of IQMS workshops to understand the role of cognitive processes, which inform and shape interpretations, perceptions, and dispositions in the determination of actions and inactions crucial for implementation success or failure. The results on the differing perceptions of IQMS across career stages illuminate the need to rethink the design of the implementation of IQMS by *inter alia*, inclusion of mechanisms that would bargain, frame and focus the effects of variations in the perceptions of IQMS, on the actual enactment of the IQMS policy.

The findings on educators' concerns about IQMS refuted Hall et al. (1977) findings that inexperienced individuals are likely to have intense concerns being awareness, informational and personal about the new policy or programme. Educators across career stages indicated that they have awareness, informational, personal, management, and consequence concerns. The fact that educators of different career stages differed on the collaboration concern shows that some of the educators' inclination is to use IQMS for their professional development. It is incumbent upon IQMS workshop facilitators to know about educators' concerns, that is, mental pre-occupations, considerations, contentions and ruminations, as conditions of human learning which could either bolster or undermine the implementation of IQMS.

Swanepoel (2008) establishes the link between perceptions and dispositions. He argues that educators' interpretations are the primary determinants of the educators' desire and willingness to engage with a policy or programme. Dispositions define behavioural readiness and the action tendencies of the implementers and address the gap between abilities and actions. The results of this research pointed to significant differences across career stages, in educators' desire and willingness to participate and

engage with IQMS. Thus, it can be argued that the varying magnitude of educators' dispositions is unable to create uniform practices advocated by the IQMS policy and programme. In fact, negative dispositions often lead to resistance and subversion of IQMS policy and programme.

The educators contemplating diversification and career change together with the disengaged and withdrawn educators differed significantly with the rest of the educators with regard to their perceptions, concerns and dispositions towards IQMS. Thus, the focus on career stages, perceptions, concerns and dispositions towards a policy or programme, provides guidance on the factors that shape dispositions to act, educators' buy-in, adoption and eventually implementation success or failure.

5. CONCLUSION

These results show that the personal dimension in the form of career stages, interpretations, concerns and dispositions cannot be ignored in the planning of an implementation strategy for the IQMS policy or programme. These results also give substance to the argument that the subjective inwardness of the implementers, as played out in educators' career stages, perceptions, concerns and educators' action tendencies account for variability in the implementation which should not be underestimated if the IQMS policy and programme implementation is to succeed. More often than not, situational explanatory variables are overemphasised while underestimating the impact of the personal dimension, especially educators' dispositions to act.

The danger with this approach is that the person called upon to change or implement change fades into the background. As a result, the potential impact of the personal dimension, that is, career stages, perceptions, concerns and dispositions as accounting for implementation success or failure receives less attention. It is the argument of the researchers that career stages, perceptions, concerns and dispositions account for variability in IQMS implementation, and that these variables are assigned insufficient weight in explaining not only IQMS implementation successes and failures, but also the implementation of other educational policies and programmes. The results of this research re-

sert the impact of cognitive and socio-psychological factors in understanding educators of different career stages, their understanding and interpretation of IQMS, and also their responsiveness to IQMS and other school policies and programmes. Variations in educators' perceptions, concerns and dispositions towards IQMS should be addressed in a targeted way. Greater within group variations within mid career educators and the dispositions of late career educators explain most of the variations. Career stages have helped decipher where variations in educators' responses to IQMS are, what are the explanatory perceptions, concerns and dispositions for such variations, which groups or subgroups of the targets of IQMS policy should be the focus of attention by IQMS policy and programme administrators.

6. RECOMMENDATIONS

While implementing government policies, it is not uncommon that the responses and reactions of those affected are ignored. Thus, this research recommends that conceptual mastery of the IQMS policy and programme by the educators should be given priority in the implementation processes since it is key to implementation success. This means that a lot of energy and resources should be expended towards ensuring that educators come to terms with the IQMS programme purposes and goals. Also, policy and programme administrators should act swiftly to address concerns and negative dispositions that might subvert and defeat the IQMS policy and its programmes.

This study generated data that could be generalised to 3370 educators in schools in one Education district of the Eastern Cape Province. If similar studies are carried out in other districts in the province and nationally, useful feedback from educators will become available. Policies are man-made and reviews based on empirical data are pertinent not only in the success of the IQMS policy, but at least parts of the feedback also will serve as a guide when formulating new policies. Although this paper makes recommendations in terms of one of South Africa's policy implementation processes, it is advisable that in other countries also, gathering of similar data from educators when policies are being implemented will be advantageous in order to receive robust feedback.

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