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Assessment policy in post-apartheid South Africa: challenges for improving education quality and learning

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The South African education system has witnessed significant changes since 1994 when the democratically elected government began the process of dismantling the inherited apartheid order. The primary focus of the transformation process was to address the twin imperative of equity and quality in education, particularly for the historically marginalised black population. A key aspect of this transformation process remains the development of alternative assessment policies. This paper reviews the changes focusing on the stated rationale as well as their underlying assumptions and implications for practice. It argues that the changes have in many respects addressed the most obvious effects of the previous apartheid systems. However, it notes that, notwithstanding the policy intentions, assessment policy since 1994 has favoured a measurement focused-approach in the classroom, which has hindered a shift towards an assessment for learning approach. This, it argues, is partly fuelled by the abiding belief in and commitment to classroom testing and examinations as well as external national assessments as the key criterion for reforming learning and teaching practices in the classroom.

Keywords: assessment; South Africa; educational policy

1. Introduction

With the demise of the apartheid system in South Africa in 1994, the most important challenge for the newly elected government was to implement a new democratic dispensation to allow for the full participation by all citizens irrespective of race, colour or creed, in all aspects that impact on their lives. Within the education sector, this transformation was marked by a number of key changes including the amalgamation of the 18 racially, ethnically and regionally separated education departments into a single national department; the elimination of race-, ethnic- and language-based admission requirements to schools; and the introduction of new norms and standards for school funding. The greatest undertaking that still impacts on the schooling system after 19 years was the implementation of a new curriculum, one that addressed the ideals of the new non-racial, non-sexist, democratic South Africa, and the development of teacher capacity and skills to provide high-quality education to all children for them to become active participants in the new society. The key transformation challenge was not limited to implementation of new curriculum policies and classroom practices, but also encompassed the vestiges of the apartheid-based system.

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Fundamental to this transformation process was the introduction and effective implementation of assessment policies. Given the discriminatory use of assessment during the apartheid era, this was a critical area to address to ensure that the specific learning needs of all children are met in the post-apartheid schooling system. While a detailed review is beyond the scope of this paper, three main points need to be highlighted regarding the impact of assessment policy and practices during the apartheid era. First, assessment practices and systems played a critical role in maintaining oppressive apartheid policies of the previous regime (Mathonsi, 1988; Nzimande, 1995; Swartz, 1992). Mathonsi (1988) and Nzimande (1995) argued that tests have been intentionally misused to deprive the black population of access to resources and opportunities, and stifle their intellectual development purposefully so as to meet the needs of the white minority for a cheap source of labour. Swartz (1992) notes that this took the form of an elaborate system of tests and examinations by which control of, and entry into, schools and the economy were regulated. The development of critical thought and active student participation in the learning–teaching process was actively discouraged and students were viewed as mere passive receivers of information (Kallaway, 1984).

Second, within the formal education sector, the assessment system comprised school-based testing and the national matriculation examinations, with the primary purpose being selection to the next level of education (Lubisi & Murphy, 2002). At the end of Grade 12, which marks the final year of schooling, all learners take the national Senior Certificate Examination, administered by the Joint Matriculation Board, an external agency. UMALUSI (2004) notes that this examination holds great significance in the lives of all South Africans as it marks the culmination of 12 years of schooling and is the most significant determinant of access into higher education, and to a lesser extent, to the world of work. Within schools, class tests and end-of-term exams were used for reporting learner progress, while end-of-year examinations were used for promotion purposes. For Grade 12 learners, Fatti (2006) notes that continuous assessment (CASS) marks contributed 50% of the final-year mark in the then Natal Education Department and 25% in the Transvaal Education Department. Talbot (1989, cited in Lubisi & Murphy, 2002) notes while ‘CASS’ in the National Education Department (NED) was designed to reduce pressure from teachers and pupils and to reduce the amount of writing in Grade 12 assessment, the opposite was found to be true in many NED schools. Third, there was limited use of assessment information to monitor and evaluate the functioning of the education system (Kanjee, 2006), and also for improving learning and teaching in the classroom (Malaka, 1995). In his study on assessment skills and practices of teachers, Malaka (1995) notes that teachers generally acquired assessment skills on their own, reported the lack of any training and support in the effective use of assessment in the classroom, and only spent time (over two hours a week) on grading and recording class tests and exams.

Against this backdrop, this paper reviews the changing ideas and notions of assessment in post-apartheid South Africa, focusing on the development and implementation of assessment policy for schools and their challenges and contradictions. The review is confined to assessment-related policy activity and gauged from relevant policy documents and publications since 1994. In this paper, we demonstrate that the policy intention of implementing an effective classroom *assessment* system is in reality a classroom *measurement* system. Introduced in 1998, and despite the many curriculum and assessment policy revisions that have taken place since then,

the ‘assessment focused, measurement-driven’ approach continues to this day and has a negative effect on learning and teaching practices.

The paper begins with an overview of the role and use of classroom assessment, followed by a review of the policy process in South Africa, highlighting the key phases since 1994 and the key policy moments within each phase. Thereafter, a description of the key assessment and curriculum policy documents is presented highlighting the assessment approaches promoted and their implications for classroom practice. The paper ends with a critique of these policies in relation to aspects such as the philosophy and approach, the model of assessment advocated, the focus on assessment versus measurement, notions of accountability, and the impact on teacher classroom practices.

2. Role and use of classroom assessment

The effective use of classroom assessment is critical for supporting teachers to improve learning and teaching (Black & Wiliam, 1998; Chappuis & Stiggins, 2008; Harlen, 2005; Nitko & Brookhart, 2011). However, teachers need quality information from high-quality assessments to make appropriate decisions regarding what to teach, how to teach, and how to evaluate student achievement (Chappuis & Stiggins, 2008; Nitko & Brookhart, 2011). Nitko and Brookhart (2011) defined assessment as, ‘a broad process for obtaining information that is used for making decisions about students, curricular programmes, and schools and educational policy’ (p. 3), and argued that assessment should be distinguished from evaluation, measurement and testing.¹ In the context of the classroom, assessment serves two functions: summative and formative (Chappuis & Stiggins, 2008; Harlen, 2005). Formative assessment is defined as any assessment where:

evidence about student achievement is elicited, interpreted, and used by teachers, learners, or their peers, to make decisions about the next steps in instruction that are likely to be better, or better founded, than the decisions they would have taken in the absence of the evidence that was elicited. (Wiliam, 2011, p. 45)

Summative assessment, on the other hand, is defined as the, ‘process by which teachers gather evidence in a planned and systematic way in order to draw inferences about their students’ learning, based on their professional judgment, and to report at a particular time on their students’ achievements’ (Assessment Reform Group [ARG], 2003, p. 4).

Regarding implementation in the classroom, Nitko (1995) presented a curriculum-based CASS framework for supporting teachers to enhance their use of assessment for both summative and formative purposes. Nitko (1995) argued that all assessments must be aligned with, and organised around, the learning targets specified in the official curriculum to ensure seamless teaching, learning and assessment. Thus, formative and summative assessments should be highly related in any teacher’s classroom practice since, ‘both are based on the same curriculum and are both carried out by the teacher ... and that a teacher may use the same assessment information in different ways on different occasions as purposes change’ (Nitko, 1995, p. 327). Formative continuous and summative continuous are two key concepts introduced by Nitko (1995) in the framework. Formative CASSs are mostly informal and consist of a teacher’s casual and impromptu observation and impressions of students’ progress in relation to the curriculum. These assessments are based on

techniques such as reviewing student work for errors and misconceptions, observing students while they carry out tasks in groups, and interacting with students during lessons to determine their level of understanding. Summative CASSs, according to Nitko (1995), are viewed as more formal activities, results of which become part of the student accountability system. Summative CASSs comprise teacher-made tests, systematic scoring of projects, assignments, and student demonstrations as well as end-of-term or end-of-year examinations.

Regarding the use of assessment to drive school reform, Torrance (2011) notes that the key problem is the schism between the educational arguments for changes in assessment to enhance learning, and the policy demands for school improvement and accountability. The educational arguments, according to Torrance (2011), revolve around the role of assessment in determining the curriculum, and manifests in practice as the ‘measurement/standards-driven instruction’ or as the ‘formative assessment movement’. The accountability argument manifests as regular testing of learners to determine if expected levels of performance are attained. In this approach, Torrance (2011) notes that teaching and learning in the classroom is assumed to rise if results improve and thus teaching and learning practices within the classroom are assumed to look after themselves. In the context of assessment policies that also focus on accountability, Torrance (2011) argues that summative assessment will always drive out formative assessment if they are set in opposition to one another, and argues that ‘we need to splice them together in an attempt to create the perfect chimera, the perfect genetically modified assessment system’ (p. 466).

3. Overview of policy development post-1994

To provide the context within which to understand the rationale, functions and implications of assessment policies in South Africa, this section provides an overview of the broader transformation process impacting on the education sector in post-apartheid South Africa. Changes in assessment policy were part of a massive flurry of policy change in post-apartheid South Africa. Following the hallmark National Education Policy Act (DoE, 1996), there was a large number of policies, green and white papers, acts, and regulations that were implemented by four different ministers of education, all seeking to transform the country’s education system (see Table 1).

Between 1994 and 2013, there were 7 white papers, 3 green papers, 26 bills (of which 17 were amending bills), 35 acts, 11 regulations, 52 government notices and 26 calls for comments that encompassed basic to higher education (Sayed & Kanjee, 2013). All of these policies were intended to ensure that substantive equality could be achieved and thus argued for active political commitment to positively discriminate in favour of those who had been disadvantaged. These changes were framed within the government’s wider and contested macroeconomic development strategies. Changes in educational policy were initially aligned to the 1994 Reconstruction and Development Programme and the Growth, Employment and Redistribution programme. The recent introduction of the National Planning Commission Development Plan 2030 (NPC, 2011) is an attempt to create a macro-framework for social change in South Africa, and captures many of the suggested changes noted in the Department of Basic Education’s Action Plan to 2014 (DBE, 2012a).

As indicated in Table 1, each phase is associated with a different minister and focused on specific aspects of the transformation process as distinguished by key

Table 1. Timeline of relevant assessment policies.

Period	Minister of education	Transformation focus	Key assessment-related policies
1994–1999	S. Bengu	Development of policy and regulatory framework	1995 – South African Qualifications Authority bill 1997 – National Curriculum Statement 1998 – Assessment Policy
1999–2004	K. Asmal	Policy implementation	2000 – Report of the Ministerial Review Committee on Curriculum 2005 2002 – Revised National Curriculum Statements
2004–2009	N.G. Pandor	Development of systems for delivery of education Improving of quality Understanding impact	2005 – National protocol for assessment in schools 2007 – National policy on assessment for schools 2008 – Foundations of Learning Campaign
2009–2014	A. Motshekga (Minister of Basic Education)	Improvement of quality, introduction of accountability systems	2009 – Education split into two Ministries – Basic Education and Higher Education 2009 – Report of the Ministerial Task Team for the review of the National Curriculum Statements 2010 – Action plan to 2014 – draft 2011 – Curriculum and Policy Statements 2012 – National Protocol for Assessment: Grades R–12 2012 – Action plan to 2014 – Final

policies that were legislated. Minister Bengu (1994–1999) was the first post-apartheid minister of education; the second phase (1999–2004); is linked with Minister Asmal; the third is associated with Minister Pandor (2004–2009); and the fourth, and current phase, is with Minister Motshekga, whose term of office began in 2009 and is expected to end in 2014.

Within this timeline, the two transformation initiatives that have had, and continue to have, a significant impact on assessment policies and practices are the National Qualifications Framework (NQF), instituted through the South African Qualifications Authority bill (DoE, 1995) and the adoption of an outcomes-based approach to curriculum reform (DoE, 1997g). The primary purpose of the NQF was to:

... create an integrated national framework for learning achievements, facilitate access to, and mobility and progression within education and training career paths, enhance the quality of education and training, and accelerate the redress of unfair discrimination in education, training and employment opportunities. (DoE, 1995, p. 1)

Within this framework, the formal schooling sector comprised two bands: the General Education and Training band, Grades R–9, and the Further Education and Training Band, Grades 10–12. Grade 12 also marked the final exit point. The framework also stipulated key qualifications, outcomes, and standards against which progress of all learners was to be assessed.

The introduction of Outcomes-based Education (OBE) signified a radical shift in the delivery of education and training in South Africa given its emphasis on learner-centred, results-orientated design (Spren & Valley, 2010). Under the banner of Curriculum 2005, the DOE committed itself to completing the implementation of the outcomes-based National Curriculum Statements (NCS) across all grades by the year 2005. As noted by the Department of Education, the adoption of an OBE strategy in the NCS implies that: (i) what learners are to learn is clearly identified; (ii) each learner's progress is based on demonstrated achievement; (iii) each learner's needs are accommodated through multiple teaching and learning strategies and assessment tools; and (iv) each learner is provided with the time and assistance to realise his/her potential (DoE, 1997g).

In practice, the NQF served as the regulatory mechanism for the implementation of the outcomes-based curriculums. Key to the successful implementation of the NQF and outcomes-based curriculum is the issue of assessment since both initiatives are based on how and against what criteria learners are assessed, the specific assessment techniques and methods used, and the mechanisms for using information and reporting on learner performance. To this end, the DoE (1997b) notes that, 'a critical aspect of the OBE approach is that it is basing curriculum design, content and delivery on the assessment of the knowledge, skills, attitudes and values needed by both learners and society' (p. 17). In addition, the definition of assessment in the policy also focuses on outcomes and phases of learning (DoE, 1998).

While there have been many changes to improve the system, there is also the dismal reality of the extremely low level of learner performance, for example Grade 9 learners across the country achieved an average score of 12.7% in mathematics in the 2011 Annual National Assessments (ANAs) (DBE, 2012b). Significant differences in performance were also noted between the Quintile 1, 2, and 3 schools, which comprise a high percentage of learners from poor backgrounds, and Quintile 5 schools, which are attended by a high percentage of learners from wealthier

families. Across Grades 1 to 6, learners in Quintile 5 schools can expect to obtain scores that are approximately 10–15% higher than their counterparts in the other quintiles (DBE, 2012b).

Arguably, the most obvious manifestation of poor schooling quality and the bifurcated nature of the South African educational system is the final school-leaving examinations results. In 2007, 10% of about 7000 secondary schools – independent schools and public schools previously reserved for white students – produced 60% of all university entrance passes. Another 10% of mainly historically black schools produced a further 20% of all university entrance passes (Sayed & Motala, 2012). Thus, in 2007, 80% of university entrance passes were generated by 20% of secondary schools, while the remaining 80% of secondary schools produced a paltry 20% of university entrance passes. This is why many commentators argued that the policy development and implementation process in South Africa is less than positive (Harley & Wedekind, 2004; Jansen, 2001; Pahad, 1999; Sayed & Kanjee, 2013; Wilmot, 2005). Jansen (2001) noted that, ‘education policy in South Africa is best described as a struggle for the achievement of a broad political symbolism to mark the shift away from apartheid to a post-apartheid society’ (p. 272) and that this ‘politics of symbolism’, as the author calls it, is disconnected from ‘any serious intention to change the practice of education on the ground’ (p. 272). The much-heralded dawn of a new era was stymied by the realisation that the problems were much larger than had been envisaged, the means far smaller and the capacity far less (Deacon, Osman, & Buchler, 2010).

4. Assessment policy post-1994

This section presents an overview of the key assessment policies by providing a brief description of each policy regarding the interpretation of assessment, its purpose and proposed use within the education system, and the implication for practice, especially within schools and classrooms. The key policies discussed include: (i) NCS (DoE, 1997c, 1997d, 1997e, 1997f) and assessment policy in the general and further education and training bands (DoE, 1998); (ii) the Revised NCS (DoE, 2002); (iii) National Policy on Assessment and Qualifications for Schools in the General Education and Training Band (DoE, 2007); (iv) the Foundations for Learning Campaign (FLC) (DoE, 2008); (v) the National Protocol for Assessment: Grades R–12 (DBE, 2011a) and the Curriculum and Policy Statements (DBE, 2011b); and (vi) the Action Plan to 2014 (DBE, 2012a).

4.1. 1998 Assessment Policy and NCS

The seminal policy on assessment was promulgated in 1998, after the introduction of the NCS and the NCS Assessment guidelines (DoE, 1997a, 1997c, 1997d, 1997e, 1997f). Assessment is defined as, ‘the process of identifying, gathering and interpreting information about a learner’s achievement, as measured against nationally agreed outcomes for a particular phase of learning’ (DoE, 1998, p. 5). Highlighting the link to the NQF and OBE, the policy notes that assessment focuses on, ‘clearly defined outcomes to credit learners’ achievements at every level, whatever pathway they may have followed, and at whatever rate they may have acquired the necessary competence’ (DoE, 1998, p. 5).

CASS is advocated as, ‘the best model to assess outcomes of learning throughout the system and enable improvements to be made in the learning and teaching

process' (DoE, 1998, p. 5) and is defined as, 'an on-going process that measures a learner's achievement during the course of a grade or level, providing information that is used to support a learner's development and enable improvements to be made in the learning and teaching process' (DoE, 1998, p. 17). The Assessment Policy (DoE, 1998) specifies that CASS, 'must be used to support the learners developmentally and to feed back into teaching and learning and should not be interpreted merely as the accumulation of a series of traditional test results' (p. 5). Teachers are given the, 'overall responsibility to assess the progress of learners in achieving the expected specified outcomes' (p. 8), and to use the reporting process to:

provide regular feedback to learners as part of the everyday learning and teaching process, to provide an accurate description of progress and achievement and to give an indication of the strengths and development needs and to identify follow-up steps for learning and teaching. (p. 9)

The NCS Assessment Guidelines for the different learning areas and phases (DoE, 1997f) provide additional details on CASS. First, the policy introduces formal and informal assessment as the mechanism through which CASS is implemented. Formal assessments are defined as assessments that provide teachers with a systematic way of evaluating how well learners are progressing in a grade and how assessment results should be recorded. Examples of formal assessment listed include projects, oral presentations, demonstrations, tests and examinations. Informal assessments are equated to daily assessments that are conducted through observations, discussions, learner-teacher conferences and informal discussion. The policy notes that these assessments are used to provide feedback to learners and to improve teaching, and need not be recorded.

The assessment guidelines also specify how formal assessment should be implemented by: (i) stipulating the number of assessment tasks that should be recorded for each school term across the different grades. For example, for Grades 4-6, two formal tasks are stipulated per term and three per term for Grades 7 and 8; (ii) prescribing the contribution of CASS marks to the final end-of-year grade of learners, that is, 100% for Grades 4-8, and 75% for Grade 9; and (iii) prescribing codes for recording and reporting of learner performance on the formal assessment tasks. In Grades 7-9, a seven-point rating scale is presented where 1 = Not Achieved and falls within the 0-29% band and 7 = Meritorious Achievement and falls within the 80-100% band. For Grade 9, the policy advocates for the use of Common Tasks for Assessments (CTAs), which are noted as external assessments intended to assess learners against the performance standards in all learning areas (DoE, 1997f). The CTAs are to contribute 25% of the Grade 9 learner's end-of-year grade. While the NCS specifies how the CTAs are to be administered, recorded and reported, no information is provided on the development of the CTAs, nor on the roles and responsibilities of teachers and schools in this process.

Focusing specifically on the development of assessment policy, Pahad (1999) noted that this is one of the most neglected aspects of the new government's efforts to transform the apartheid-based education system, even though assessment formed the basis of the two most important curriculum reform initiatives introduced: the NQF and OBE (Potenza & Monyokolo, 1999). The issue of assessment (Pahad, 1999) and the assessment of learning outcomes in particular (Crouch & Mabogoane, 1998) have received minimal attention in the early education policies in South

Africa. Potenza and Monyokolo (1999) concurred with this view, noting that ‘it is a serious indictment of the education establishment that the implementation of OBE started before a coherent policy on assessment had been formulated’ (p. 247).

Moreover, the policy proposals are based on the assumption that teachers are familiar with the different modes of assessment and have the capacity and skills to implement the proposed assessments across the different contexts that define learning and teaching in South African schools. However, the Ministerial Task Team (DBE, 2009) notes that, ‘assessment has been a challenge for teachers ever since 2005, when an unnecessarily complicated approach to assessment was introduced’ (p. 8). Acknowledging that the proposed CASS model offers exciting possibilities for maximising learning through the use of diverse assessment procedures and techniques, Wilmot (2003) notes that the mechanics of OBE assessment are complex and require a high level of competence among teachers, both as curriculum developers and as assessors. Also, in her review of the ‘Draft 1998 assessment policy’, Pahad (1999) argues that CASS is presented as, ‘if this were the panacea of all inadequacies of past assessment practices and as if the term were self-explanatory’ (p. 249). In her study on the implementation of the CTA, Wilmot (2005) reports that teachers found it difficult to judge the validity of assessment tasks due to the range and diversity of these tasks, and questioned the reliability of an external standardised assessment model which was based on a system of internal marking.

This use of CASS by teachers can also be problematic, given the dual messages inherent in its implementation of CASS and the different interpretations regarding its use (Nitko, 1995). Echoing these concerns, Pahad (1999) argues that the term CASS is interpreted very differently by different people or even by the same people in different contexts and contends that the policy does not account for the popular interpretation among teachers that CASS means setting more tests and examinations on a more regular basis. Similarly, Morrow (2007) noted that CASS:

frequently turns out to be little more than an unbroken stream of tests, projects and exercises that merely spread the misery – learners are constantly under the burden of knowing that everything they do will be ‘assessed’ and might have consequences for their eventual ‘success’. And teachers tend to be driven to such frenzy about ‘assessment’ and ‘portfolios’ that they have little time to ‘teach’. (p. 8)

4.2. Revised National Curriculum Statements

Based on the recommendations of the *Curriculum 2005* Review Committee (DoE, 2000), the Revised National Curriculum Statements (RNCS) were released in 2002 to streamline and strengthen the implementation of Curriculum 2005. Among other issues identified, the Review Committee noted that the implementation of OBE curriculum had been confounded by: ‘(i) a skewed curriculum structure and design that lacked alignment between curriculum and assessment policy; and (ii) inadequate orientation, training and development of teachers’ (DoE, 2000, p. vii). A key recommendation of the Review Committee was to simplify the curriculum and address the issue of curriculum overload. In practice, this translated to reducing the number of learning areas, retaining the existing 12 critical outcomes and dropping the 66 specific outcomes as well as their associated assessment criteria, phase and programme organisers, range statements, performance indicators and expected levels of performance (DoE, 2000).

While the 1998 Assessment Policy remained unchanged, the RNCS included a number of assessment-related amendments. First, as stipulated in the RNCS mathematics policy (DoE, 2002), assessment was defined as ‘a continuous, planned process of gathering information about the performance of learners measured against the Assessment Standards of the Learning Outcomes’ (p. 93). This definition was intended to link assessment activities to the assessment standards and learning outcomes introduced in the RNCS. Vandeyar and Killen (2003) describe this as a shift from the criterion-referenced assessment noted in the 1998 Assessment Policy to a form of standards-referenced assessment. Second, the purpose of assessment was revised to focus specifically on enhancing individual growth and development, on monitoring the progress of learners and facilitating their learning. Significantly, references to specific outcomes and learning programmes (DoE, 1998) are omitted, in keeping with the recommendation of the Curriculum Review Committee (DoE, 2000).

Third, a significant change instituted regarding the development and application of the CTAs is that the CTAs, ‘may be set at national, provincial, district and cluster level, are conducted at school level and are moderated externally’ (DoE, 2002, p. 96). This seemingly minor change added a number of significant challenges for Grade 9 teachers, most notably increased workloads in the form of administration of additional assessment tasks as well as additional marking and recording of scores (Sithole, 2009), and enhanced frustration emanating from managing the tension between maintaining the validity of the CTAs as a national assessment tool and addressing the specific needs of learners in the class (Bansilal, 2010). Fourth, the RNCS also prescribed clear procedures for managing and reporting assessment results, which significantly increased workloads for teachers and school managers (DBE, 2009). Specifically: (i) schools were required to develop a School Assessment Plan to outline how CASS is planned and implemented, how information is reported and how staff will be trained in the area of assessment; (ii) national codes based on a four-point scale were prescribed for reporting all scores²; and (iii) at the end of the each year, teachers were required to complete progression schedules which provide a summary about the progress of all learners in the grade, and learner profiles which record all information about a learner and are meant to accompany learners throughout their school careers.

The RNCS assessment guidelines for teachers also reinforced the link between assessment practices and the principles of OBE as specified in the opening statement of the learner assessment chapter: ‘The assessment framework of the Revised National Curriculum Statement Grades R–9 (Schools) is based on the principles of OBE’ (DoE, 2002, p. 93). In addition, CASS is also underpinned as the assessment model of choice. The policy specifies, ‘CASS is the chief method by which assessment takes place in the Revised National Curriculum Statement. It covers all the OBE principles’ (DoE, 2002, p. 95). However, unlike the NCS policy, the RNCS policy does not stipulate the number and types of assessments required across the different grades, nor is any information provided on the contribution of internal CASS marks to the final grade of learners. Commenting on the consequence of this omission, or misalignment to the assessment policy, the 2009 Ministerial Task Team reported that, ‘teachers were told to continue to use the old assessment policy, developed for Curriculum 2005. Over time, incremental changes were made to the assessment policy creating widespread confusion with respect to assessment practices’ (DBE, 2009, p. 14).

Reflecting on the revisions to the assessment policy, Vandeyar and Killen (2003) argued that the RNCS made several major advances in helping to simplify assessment in South African schools, noting the removal of much of the confusing OBE jargon, making explicit the links to the principles of OBE, and providing a workable standards framework. The 2009 Ministerial Task Team (DBE, 2009) also reports that the RNCS simplified and clarified the OBE-based curriculum. However, the Ministerial Task Team acknowledged that while the 2000 Review Committee (DoE, 2000) renewed the commitment to an outcomes-based framework for the national curriculum, it failed to address the lack of knowledge stipulation for teachers (DBE, 2009). Similarly, Vandeyar and Killen (2007) argued that the failure to provide teachers with guidelines on the fundamental principles of good assessment practices was one of the major weaknesses of the RNCS.

4.3. 2007 Assessment Policy

The National Policy on Assessment and Qualifications for Schools in the General Education and Training Band (DoE, 2007) was specifically intended to address the shortcomings of the 1998 policy, and to consolidate assessment issues noted in a range of different documents. These include the assessment chapters of the RNCS for each of the different learning areas (DoE, 2002), the Teacher Guides for the Development of Learning programmes (DoE, 2003) and the National Protocol on Assessment for schools (DoE, 2005).

A comparison of the 2007 policy (DoE, 2007) to the 1998 Assessment Policy (DoE, 1998) and mathematics NCS (DoE, 1997f) reveals a number of similarities. The definition, uses and role of teachers in the assessment process were very similar. Also, the philosophy and approach to assessment remained the same, with CASS still being advocated as the implementation model although all references to OBE were removed. In addition, the concept of ‘formal’ and ‘informal’ assessment, as well as the contribution of CASS to the final grades of learners, is now stated in the assessment policy as opposed to the supporting curriculum documents. Limited information is provided on how ‘informal’ assessments should be implemented. However, in contrast, the emphasis on ‘formal’ assessment, first introduced in the NCS policy (DoE, 1997g), is again reiterated, in the vastly expanded section in which the reporting and implementation of formal tasks for the different phases and learning areas are prescribed. As noted in Table 2 below, only codes and descriptions are used for the Foundation Phase (Grades R–3) while for the Intermediate

Table 2. Reporting format – Foundation Phase (Grades R–3) and Intermediate Phase (Grades 4–6).

Foundation Phase: rating code and description		
Intermediate Phase: rating code, description and percentages		
Code	Description	Percentages ^a
4	Outstanding/excellent achievement	70–100
3	Satisfactory achievement	50–69
2	Partial achievement	35–49
1	Not achieved	1–34

^aOnly reported for Grades 4–6.

Table 3. Reporting format for Senior Phase (Grades 7–9).

Code	Description	Percentages
7	Outstanding achievement	80–100
6	Meritorious achievement	70–79
5	Substantial achievement	60–69
4	Adequate achievement	50–59
3	Moderate achievement	40–49
2	Elementary achievement	30–39
1	Not achieved	0–29

Phase (Grades 4–6) percentages are also reported. For the Senior Phase (Grades 7–9), a seven-point reporting scale is presented (see Table 3). The number of formal assessments prescribed varies across the different phases and subjects, and progressively increases for the higher grades, with more tasks prescribed for languages and mathematics (see Tables 4–6 for the Foundation, Intermediate and Senior Phases, respectively).

While these changes introduced greater levels of differentiation across the grades and subjects, it also provides clear signals that privilege formal assessment over informal assessments. Moreover, given that no guidelines are provided for how to use informal assessment in the classroom, it can be expected that teachers will focus on the formal assessments. The policy (DoE, 2007) also introduced new forms of reporting, providing a number of templates that report information as per the prescribed formal assessments for each term. All schools were also required to keep learner profiles, which are defined as, ‘a continuous record of information that gives a holistic impression of a learner and the learner’s progress and performance. It

Table 4. Number of formal assessments prescribed for the Foundation Phase.

Learning area	Term 1	Term 2	Term 3	Term 4	Total
Literacy (languages)	4	4	4	4	16
Additional language (optional in Grades 1 and 2)	2	2	2	2	8
Numeracy (mathematics)	3	3	3	3	12
Life skills/orientation	1	1	1	1	4

Table 5. Number of formal assessments prescribed for the Intermediate Phase.

Learning area	Term 1	Term 2	Term 3	Term 4	Total
Language 1	2	2	2	2	8
Language 2	2	2	2	2	8
Language 3 (<i>optional</i>)	1	1	1	1	4
Mathematics	2	2	2	2	8
Natural sciences	1	2	1	2	6
Social sciences	1	2	1	2	6
Technology	1	1	1	1	4
Economic and management sciences	1	1	1	1	4
Life orientation	1	1	1	1	4
Arts and culture	1	1	1	1	4

Table 6. Number of formal assessments prescribed for Grades 7 and 8^a.

Learning area	Term 1	Term 2	Term 3	Term 4	Total
Language 1	3	2	3	2	10
Language 2	2	2	2	2	8
Language 3 (<i>optional</i>)	2	1	2	1	6
Mathematics	3	3	3	3	12
Natural sciences	2	2	2	2	8
Social sciences	2	2	2	2	8
Technology	1	1	1	1	4
Economic and management sciences	1	1	1	1	4
Life orientation	1	1	1	1	4
Arts and culture	1	1	1	1	4

^aFor Grade 9, the Term 4 assessments were replaced by the CTAs.

assists teachers in the next grade or at a different school to understand the learner better and thereby respond appropriately to the learner' (p. 19). In addition, the policy also required teachers to keep portfolios containing all documents related to assessment (i.e. planning, formal task developed, records of marks, etc.), and noted that these portfolios 'should be available on request at all times for moderation and accountability purposes' (DoE, 2007, p. 17). Commenting on the practical implications for the teacher, the Ministerial Task Team (DBE, 2009) noted that, 'the planning requirements of teachers has become unnecessarily complicated and appear to make little contribution to improving teaching or learner attainment; on the contrary, the administrative burden around assessment and planning appear to impact negatively on teaching and contact time' (p. 8). Regarding the response of education department officials to these changes, the Ministerial Task Team reported that:

officials appear to have taken a highly bureaucratic approach to assessment, insisting on particular forms of recording. A tick list approach in many instances simply ascertains whether all assessment standards have been covered, rather than considering the quality of the assessment procedures and whether the appropriate content is being covered. (DBE, 2009, p. 31)

A radical departure from the previous policies was the stipulation that 'Grade 9 marks the end of the compulsory phase of schooling' (DoE, 2007, p. 26) and that qualifications would be, 'required for access to Grade 10 at a school, NQF level 2 qualification at an FET college, other learning pathways in the FET bank or access to a different pathway at NQF level 1' (p. 26). The policy specifies that the CTAs will be used to determine promotion from Grade 9, and thus stipulates that the CTA will be externally set by the national department (as opposed to district or provincial departments first proposed in the RNCS) with teachers conducting the administration and marking. The CASS results of Grade 9 learners were to comprise 75% of the final grade with external assessment comprising 25%, with the National Certification Council, UMALUSI, tasked to 'attest to the standard, appropriateness and applicability of both the Continuous Assessment and the CTA' (DoE, 2007, p. 25). While no details are provided on how this process was to unfold in practice, this revised policy resolutely embeds the CASS process as a high-stakes activity, thus providing a clear signal to teachers on which assessments should be prioritised.

What was different from the 1998 policy and the RNCS documents was the omission of any references to the expected levels of performance, as per the recommendation of the Curriculum Review Committee (DoE, 2000). In addition, all references to different uses/types of assessment are omitted from the 2007 policy with no mention made of summative or formative assessment. Given how the new concepts of informal and formal assessment are defined, it is evident that these concepts were introduced to replace the terms formative and summative assessment. More importantly, while the policy advocates a CASS approach to assessments, the classroom practice that is prescribed for teachers is one which is measurement-driven that promotes CASS as assessing continuously, given the prominence on formal testing, recording and reporting. However, limited information is presented on how formal assessment results should be used to improve learning and teaching practices.

4.4. Foundations for Learning Campaign

The FLC was introduced in March 2008 to address the challenge of poor quality within the schooling sector in South Africa. Intended as a four-year campaign, the ultimate goal was to increase the average performance of all Grades 1–6 learners in languages and mathematics to not less than 50% (DoE, 2008). To support the attainment of this goal, the Department of Education: (i) undertook to provide all teachers with the appropriate resources for effective teaching and learning, e.g. lesson plans and work schedules; (ii) provided clear stipulations for teaching time and daily activities in the two subjects; (iii) stipulated that all teachers must assess, track and record learner progress and achievement on a monthly basis and report this to the district office on a quarterly basis – district officers were also required to submit these reports to the provincial office; and (iv) required all Grades 3 and 6 learners to undergo standardised testing in languages and mathematics to measure progress made towards achieving the set targets (DoE, 2008). Besides the clear intent on improving quality that this campaign signalled, the significance of the FLC lies in its advocacy and planned implementation. The regular testing of learners by schools was well aligned to formal assessment prescribed in the 2007 Assessment Policy, while the quarterly reporting of all learner test results to districts was a new requirement.

A discerning contribution of the FLC was the introduction of ‘census testing’ to the education landscape in South Africa. In particular, these national external tests provided a source of information that could be used for holding school heads and teachers accountable for the performance of their learners. Given that the policy is silent on any aspect regarding the use of assessment results, both by teachers and by education department officials, it is not unexpected that the FLC was viewed as forming the basis of a new accountability. In her review of the FLC, Meier (2011) supports this view and notes that the, ‘most disconcerting aspect of the FLC is that it is rich in control measures, but poor in conveying strategic measures for ensuring the success of the campaign’ (p. 555). While the FLC tests were first administered at the end of 2008, and again in 2009, their implementation was beset with a myriad of problems. These include: schools not receiving the instruments in time, or being unable to print hard copies of the tests; the use of poor procedures and monitoring mechanisms regarding the administration of the tests; the lack of training on how to score, enter, clean and analyse the data; the non-receipt of and problems with the

data-capture templates; and the inability or unwillingness of schools to submit learner performance data to the district offices (Meier, 2011). This indicates that the schooling system was inadequately prepared to address the mechanics of such an intervention. Thus, it is no surprise that the intent regarding the use of the test results for monitoring or for improving learning was ‘not even on the radar’ for teachers and education department officials.

Notwithstanding this criticism, the Ministerial Task Team (DBE, 2009) noted that the Foundations for Learning, ‘addressed many of the current problems with the *National Curriculum Statement* documents, and must be implemented in all schools in 2010’ (p. 63). The Task Team based their recommendation on submission from teachers who reported the strength of the FLC, ‘as offering a clearer plan for teachers, freeing them to spend their time and energy constructing appropriate lesson plans and assessment tasks. In short, teachers felt the need to devote their energy to delivering quality instruction’ (p. 19). While the Task Team does not report on testing in Grades 3 and 6, it does recommend that there, ‘should be regular, external, systemic and national assessment of mathematics and home language and the testing must be extended to First Additional Language (English) for all learners in Grades 3 and 6’ (DBE, 2009, p. 37) and that the, ‘CTAs should be replaced with annual national testing for *all* Grade 9 learners in mathematics, home language and first additional language (English) to ensure successful transition to the FET phase’ (p. 37). However, the Task Team should have also included specific recommendations: to clarify the purpose of national testing, to include clear guidelines for how the assessment information should be used, and to specify how the capacity and skills of teachers should be developed to effectively use test information for improving learning and teaching.

4.5. Action Plan 2014

The *Action Plan to 2014: Towards the Realisation of Schooling 2025* (DBE, 2012a) represents a significant milestone in the South African policy landscape as it is the first national document to project a long-term plan for addressing the challenges of poor quality. First published in July 2010 for public comment (DBE, 2010), and finalised in January 2012, the Action Plan 2014 (DBE, 2012a) comprises 27 goals (see Table 7). The first 13 focus on key outputs (as measured by 18 indicators), while the other 14 goals focus on how the outputs are to be achieved (also measured by 18 indicators). The Action Plan 2014 proposes the use of the ANA as a key mechanism to improve quality through assessment, monitoring and supervision. Specifically, ANA is expected to improve learning in four ways: (i) exposing teachers to best practices in assessment; (ii) providing information for districts and the provincial department to target intervention to schools that need it most; (iii) giving schools the opportunity to pride themselves in their own improvement; and (iv) giving parents better information on the education of their children (DBE, 2012a).

While the positive relationship between good assessment practices and improved learning is explicitly acknowledged, a number of uncritical assumptions are made regarding the strengthening of this relationship through the use of the ANA. First, that making tests available to teachers will increase their awareness of how the outcomes expressed in the curriculum statements should be assessed. Second, that making test scores public will somehow spur parents to become more involved in the debates in the schools and enhance their involvement in the schooling matter

Table 7. Action plan 2014: goals, indicators, targets and source of information^a.

	Targets			Data source
	Baseline	2019	2024	
Goal 1: Increase the number of learners in Grade 3 who, by the end of the year, have mastered the minimum language and numeracy competencies for Grade 3.				
1.2 Percentage of Grade 3 learners performing at the required <i>literacy</i> level according to the country's Annual National Assessments.	48	75	90	ANA
1.3 Percentage of Grade 3 learners performing at the required numeracy level according to the country's Annual National Assessments.	43	75	90	ANA
Goal 2: Increase the number of learners in Grade 6 who, by the end of the year, have mastered the minimum language and mathematics competencies for Grade 6.				
2.1 Percentage of Grade 6 learners performing at the required <i>language</i> level according to the country's Annual National Assessments.	37	75	90	ANA
2.2 Percentage of Grade 6 learners performing at the required mathematics level according to the country's Annual National Assessments.	19	75	90	ANA
Goal 3: Increase the number of learners in Grade 9 who, by the end of the year, have mastered the minimum language and mathematics competencies for Grade 9.				
3.1 Percentage of Grade 9 learners performing at the required <i>language</i> level according to the country's Annual National Assessments.	n/a	75	90	ANA
3.2 Percentage of Grade 9 learners performing at the required mathematics level according to the country's Annual National Assessments.	n/a	75	90	ANA
Goal 4: Increase the number of Grade 12 learners who become eligible for a bachelor's programme at a university.				
4 Number of Grade 12 learners who become eligible for a bachelor's programme in the public national examinations.	110,000	250,000	300,000	NSC
Goal 5: Increase the number of Grade 12 learners who pass mathematics.				
5 Number of Grade 12 learners passing <i>mathematics</i> .	125,000	250,000	350,000	NSC
Goal 6: Increase the number of Grade 12 learners who pass physical science.				
6 Number of Grade 12 learners passing <i>physical science</i> .	120,000	250,000	320,000	NSC

(Continued)

Table 7. (Continued).

	Targets			Data source
	Baseline	2019	2024	
Goal 7: Improve the average performance of Grade 6 learners in <i>languages</i> .				
7 Average score obtained in Grade 6 in <i>language</i> in the SACMEQ assessment.	495	550 (year 2017)	600 (year 2022)	SACMEQ
Goal 8: Improve the average performance of Grade 6 learners in <i>mathematics</i> .				
8 Average score obtained in Grade 6 in <i>mathematics</i> in the SACMEQ assessment.	495	550 (year 2017)	600 (year 2022)	SACMEQ
Goal 9: Improve the average performance of Grade 8 learners in <i>mathematics</i> .				
9 Average Grade 8 mathematics score obtained via TIMSS.	264	380 (2015)	420 (2023)	TIMSS
Goal 13: Improve the access of the youth to Further Education and Training (FET) beyond Grade 9.				
13 The percentage of youth who obtain a National Senior Certificate from a school.	40	60	70	NSC
Goal 16: Improve the professionalism, teaching skills and subject knowledge of teachers throughout their entire careers.				
16.2 The percentage of teachers who are able to attain minimum standards in anonymous and sample-based assessments of their subject knowledge.		To be finalised		

^aANA – Annual National Assessment; NSC – National Senior Certificate Examinations; SACMEQ – Southern African Consortium for Monitoring Educational Quality; and TIMSS – Trends in International Mathematics and Science Studies.

regarding their children. Third, that the ANA results will be used to set targets by schools, while districts will be able to monitor performance of schools based on their achievement of these targets, and fourth, the notion that the need to belong to high-performing schools will spur teachers to improve learning and teaching in their classes. All these assumptions are tenuous at best, and are presented as a magical wand for many ills while the assumption is that a database will automatically improve quality (Sayed, *in press*). The practical reality presents a different picture, as assessment practices of teachers are dominated by a discourse of recording and reporting of learners' scores, with limited focus on the use of assessment for addressing learners' learning needs (Kanjee & Croft, 2012).

For each indicator (see Table 7), specific targets have been determined for three 5-year cycles, 2009–2014, 2014–2019, and 2019–2024, presumably to coincide with the terms of office for future ministers of education. Thirteen of the 18 output indicators (excluding indicator 16 which focuses on testing a sample of teachers) are based on learner performance data: ANA (6); Grade 12 National Senior Certificate Examinations (4); SACMEQ (2); and TIMSS (1).³ Of these 13 indicators, 10 focus

on performance in literacy or numeracy. All the ANA indicators are listed as ‘performance at the required level’ (p. 173) with no information included on what is meant by ‘required level’. Addressing this omission, the NPC (2011) notes that the, ‘performance standard is ambiguous ... We propose that the acceptable level of performance be defined as 50% and above’ (p. 275). Regarding the overemphasis on learner performance, Sayed (*in press*) notes this cements the notion that quality can be equated to performance in languages and mathematics, and questions the lack of emphasis on the issue of equity.

4.6. National Protocol for Assessment and Curriculum and Assessment Policy Statements

The introduction of the Curriculum and Assessment Policy Statements (CAPSs) represents the third attempt by the Education Department to revise the curriculum. This intervention is based on the recommendations of the 2009 Ministerial Task Team to review the curriculum, the most critical of which was:

to develop one Curriculum and Assessment Policy document for every learning area and subject (by phase) that will be the definitive support for all teachers and help address the complexities and confusion created by curriculum and assessment policy vagueness and lack of specification, document proliferation and misinterpretation. (DBE, 2009, p. 7)

In a departure from the past, the assessment policy was also revised (as recommended), and is closely aligned to the new curriculum. This policy, adopted in September 2011 as the National Protocol for Assessment Grades R–12 (DBE, 2011a), is intended to address the weaknesses and gaps identified in the 2007 policy. While much of the 2007 policy has been retained, a key difference is that the 2011 policy is applicable to all grades within the schooling system, from Grade R to Grade 12.

The concepts of ‘informal’ and ‘formal’ assessment, first introduced in the 2007 policy, are further extended with clear links being made to assessment for learning and assessment of learning, respectively. The policy notes that, ‘Informal (assessment for learning) or daily assessment is the monitoring and enhancing of learners’ progress. This is done through teacher observation and teacher-learner interactions, which may be initiated by either teachers or learners’ (p. 3). The policy specifies further that informal assessment should be, ‘used to provide feedback to the learners and teachers, close the gaps in learners’ knowledge and skills and improve teaching’ (p. 3) and goes on to argue that, ‘informal assessment builds towards formal assessment and teachers should not only focus on the formal assessment’ (p. 3). Formal assessment is noted as being synonymous with assessment of learning and is regarded as a, ‘process that provides teachers with a systematic way of evaluating how well learners are progressing in a particular subject and in a grade’ (p. 3). The policy further notes that teachers must ensure that assessment criteria are very clear to the learners before the assessment process, and that feedback should be provided to the learners after assessment.

The emphasis on CASS is maintained in this policy, albeit under a different name – School-based Assessment (SBA). SBA is presented as a compulsory component for progression and promotion in the different phases, with clear prescriptions regarding the percentage that SBA contributes to the end-of-year mark of learners

Table 8. SBA and examination percentage marks by phase.

Phase and grades	SBA component %	End-of-year examination %
Foundation (R–3)	100	0
Intermediate (4–6)	75	25
Senior (7–9)	40	60
Further education and training (10–12)	25	75

(see Table 8). In addition, the seven-point rating scale first prescribed for recording and reporting learner scores in the Senior Phase (DoE, 1997f) is now extended to all subjects and grades (see Table 3). All references regarding the number and type of tasks, however, have been moved to the CAPS documents for the different subjects.

Similar to the RNCS documents, the CAPS document (DBE, 2012b) specifies the number of assessments to be conducted for each term, and lists the uses of assessment pertaining to summative (assessment of learning) and formative (assessment for learning). However, the CAPS document also stipulates the types of (SBA) assessment that should be conducted each term for the different subject areas. It further indicates the weighting between SBA (continuous) tasks and the end-of-year examinations (see Table 8) and the cognitive levels and percentages that each level should contribute, and provides a scale for how scores should be reported. Table 9 lists the minimum requirements for formal assessment specified in the mathematics Intermediate Phase CAPS document, while Table 10 lists similar requirements for languages in the Senior Phase.

In addition, the 2011 Assessment Policy also provides greater detail regarding the composition of teacher files (introduced as teacher portfolios in the 2007 policy)

Table 9. Minimum requirements for formal assessment – mathematics Intermediate Phase.

Forms of assessment	Minimum requirements per term				Number of tasks per year	Weighting %
	Term 1	Term 2	Term 3	Term 4		
SBA Tests	1	1	1		3	75
Examination		1			1	
Assignment	1			1	2	
Investigation				1	1	
Project			1		1	
Total	2	2	2	2	8	
End-of-year examination					1	25

Table 10. Formal assessment in the Senior Phase for languages.

During the year	End-of-year examination	
40%	60%	
School-based assessment (SBA)	End-of-year exam papers	
10 formal assessment tasks	10 formal assessment tasks	10 formal assessment tasks
• 4 oral tasks	• 4 oral tasks	• 4 oral tasks
• 2 writing tasks	• 2 writing tasks	• 2 writing tasks

as well as the management of school assessment records and learner profiles, providing specific templates for learner report cards, promotion schedules and learner profiles. Similar to previous assessment policies, the 2011 policy as well as the CAPS subject-specific documents (DBE, 2011a, 2011b, 2011c), limited information is provided on how informal assessment should be implemented. No details are noted for how these forms of assessment should be applied, nor are techniques or tools listed or any examples provided on how teachers should apply these assessments. This omission is a serious limitation of the policy especially since research evidence is clear that the effective use of assessment can result in significant learning gains (Black & Wiliam, 1998). However, Harlen (2005) and Bennett (2011) caution that the effective implementation of assessment in the classroom is a complex process that can be time-consuming and requires highly competent and knowledgeable teachers.

5. A stock-take of post-apartheid education assessment policies

A review of the assessment and curriculum policies promulgated since 1994 reveals a number of trends regarding the development and application of assessment policy and practices. First, the assessment policy development process, and specific philosophy and approaches promoted during this process, are a manifestation of the stages of development of the education system at large. Each of the key assessment policy moments can be linked to the four time periods regarding the policy process, each associated with a different minister. Sayed and Kanjee (2013) note that the first period (1994–1999), under Minister Bengu, remained the most significant as it specified the legislation and frameworks to redress the legacy of apartheid and transform the education system. This is clearly reflected in the 1998 Assessment Policy (DoE, 1998) which notes that one of its principal aims is to introduce a shift from past practices that were:

dominated by public examinations, which are ‘high stakes’ end [*sic*] whose main function has always been to rank, grade, select and certify learners, to a new system that informs and improves the curriculum and assessment practices of educators and the leadership, governance and organisation of learning sites. (p. 6)

In directing the shift from apartheid-based assessment practices while simultaneously demonstrating support for, and aligning to, the implementation of OBE, CASS is introduced as the model for all assessments. In practice, CASS advocates for: (i) using different types of assessment that include formative, summative, diagnostic and evaluative as well as formal and informal assessment; and (ii) removing or reducing the contribution of examination marks by prescribing the contribution of CASS components to the final grade of learners.

The adoption of CASS as the ‘best model’ can be explained by two factors. First, from how assessment is used within an OBE context, where teachers are required to ‘continuously diagnose and assess on-going student practice and performance, offer frequent and focused feedback, and intervene constructively in the learning process in a timely manner’ (Spady, 1994, p. 38). Second, the African National Congress (ANC) policy framework for education and training⁴ (ANC, 1995) notes that assessment and evaluation should focus on identifying learner problems, and monitoring learners’ progress and teacher effectiveness, and that

'assessment and evaluation practices will be based on a combination of CASS (tests, essays, projects, practical and field studies) as well as national examinations' (ANC, 1995, p. 75). However, the introduction of the proposed CASS model was not without its challenges, as noted in the following sections.

The second period (1999–2004), under Minister Asmal, focused on implementation of policy, the development of systems and delivery of education (Sayed & Kanjee, 2013). The appointment of a ministerial committee to review the implementation of Curriculum 2005 (DoE, 2000) attested to the revised policy focus. Moreover, Wilmot (2005) notes that the implementation of key recommendations emanating from the Curriculum Review Committee (DoE, 2000) regarding the curriculum reform process, and assessment practices in particular, marks the shift from what Jansen (2001) calls 'symbolic change' to one make in which policy is enacted and real change starts to take place. Specifically, the call by teachers for simplifying the curriculum and reducing workloads related to assessment was adhered to when the RNCS were published. However, during the same period, the seminal systemic evaluation study was also implemented (Kanjee, 2006). According to Muller (2004), this study, together with the regional Monitoring Learning Achievement (MLA) and Trends in Mathematics and Science Studies (TIMSS), was significant as it marked the entry of assessment outcomes as an instrument of managerial accountability and as an indicator of systemic efficiency in the policy discourse in South Africa.

The third period (2004–2009), associated with Minister Pandor, was distinguished by efforts to improve quality and to understand the impact of the school reform initiatives, through the use of assessment (Sayed & Kanjee, 2013). Braun and Kanjee (2006) note that similar strategies have been employed by a number of developing nations including Brazil, Chile, Kenya, Uganda and Uruguay. The manifestation of this strategy is evidenced in the 2007 Assessment Policy (DoE, 2007) that further entrenched the CASS model by prescribing the number of formal assessments across the different phases and subjects, prescribed new forms of recording and reporting (i.e. learner profiles and teacher portfolios), and introduced the CTAs as a national, external examination to effect Grade 9 as an exit point and to provide additional information regarding the quality of education. Moreover, to monitor and evaluate the quality of learning and teaching within the system, census testing for all learners in Grades 3 and 6 was introduced as part of the Foundations for Learning Campaign (DoE, 2008).

The improvement of education quality using accountability systems is perhaps the most appropriate description for the fourth period since the new government began the transformation of the education system in South Africa in 1994. This period under Minister Motshekga began in 2009 and is expected to end in 2014. The intention to establish an assessment-based accountability regime is clearly specified in the Action Plan 2014, using the census-based ANA in Grades 1–6. In addition, the National Protocol for Assessment and the CAPS further entrench the use of formal assessments within schools, replacing the CASS model with SBA to record and report information on learner performance. Significantly, the proposal for Grade 9 as an exit point is dropped and replaced with census-based Annual National Assessment, similar to that for Grades 1–6. Sayed (*in press*) questions the extent to which this conceptualisation of assessment and monitoring can improve quality and argues that the singular focus on ANA fails to acknowledge the magnitude of the

challenges the educational system faces and prevents an engagement with multiple processes and outcomes that result from any new policy.

Second, the use of CASS, as the ‘preferred’ model for assessment (DoE, 1998), persists across the different revisions of the assessment policy. The key reasons for adopting CASS as the preferred model are noted above, that is, due to OBE and the ANC Policy Framework. However, to understand the dominance of CASS, we must turn to the 2009 Ministerial Task Team findings (DBE, 2009) that report on the reasons for the 1998 Assessment Policy remaining unchanged when the RNCS were introduced. The Task Team notes that in their submission, Chisholm and Lubisi (chair and member of the 2000 Curriculum Review team, respectively) reported that a key issue:

that could not be resolved was whether the school assessment system should reintroduce test and exam-based assessment, or whether there should continue to be more emphasis on other continuous forms of assessment, such as portfolio and project work, during the course of year. In the absence of agreement, the existing policy prevailed. (p. 30)

The Task Team report goes on to note that:

because the debates were not resolved, over the past seven years there have been numerous attempts to determine and clarify an assessment policy. This has resulted in assessment policy that is misunderstood and inconsistent throughout the system and that is extremely onerous for teachers in terms of its requirements. (DBE, 2009, p. 30)

According to Jansen (2001), this confusion and misalignment across related policies is one of the consequences of introducing ‘symbolic policies’.

Third, specific notions and understandings of assessment as CASS first introduced in the 1998 policy have been steadily revised from an ‘assessment focus’ to a ‘measurement focus’ policy. In presenting a framework for the effective use of CASS, Nitko (1995) lists two meanings/uses of CASS: as a summative mark used for examination purposes, and as a diagnostic and formative evaluation of student learning. He notes that these ‘different meanings can be confusing and may make implementation of CASS problematic’ (p. 322). Nitko (1995) also notes that:

formative CASSs primarily serve purposes such as: (a) identifying a student’s learning problems on a daily and timely basis; and (b) giving feedback to a student about his or her learning. Because they are formative, the results of these assessments are not used as a basis for official termly or yearly marks or grades. (p. 328)

It is this interpretation of CASS that was introduced in the 1998 policy, notwithstanding its primary intention of supporting the implementation of the new OBE curriculum.

A review of the assessment and curriculum policy documents (DBE, 2011a, 2011c; DoE, 2002, 2007) reveals a clear trend of an ‘assessment-focused but measurement-driven’ approach. Across the different revisions of these policies, the use of informal, daily assessment for improving learning is advocated. The 2007 policy notes that CASS is used, ‘to determine a learner’s achievement during the course of a grade, provide information that is used to support the learner’s development, and enable improvements to be made to the learning and teaching process’ (DoE, 2007, p. 13). Similarly, the 2011 policy notes that classroom assessment should be both

formal and informal and should be used to, 'provide feedback to the learners and teachers, close the gaps in learners' knowledge and skills and improve teaching' (DBE, 2011a, p. 5). However, in both the 2007 and 2011 assessment and curriculum (RNCS and CAPS) policy documents, limited information is presented for how these informal assessments should be implemented while substantial information is presented on the use of formal assessments. Clear guidelines are provided for the number and types of assessments to be applied across the different learning areas and phases while specific templates are provided for the recording and reporting of information.

What these guidelines lack, however, is how information obtained from formal assessments should be used to support improvements in learning and support teachers in improving their teaching practices (Kanjee, 2009). This limitation has resulted in a discourse of 'recording and reporting' where the reporting and recording of assessment information are privileged over the effective use of the information to improve learning and teaching practices (Kanjee & Croft, 2012). This discourse is also evident in the implementation of the ANA. Large sums of money have been spent to obtain 'valid and reliable' information for use in improving learner levels of performance, but limited information and support are provided to teachers for how this should be attained. The primary consequence has been the relegation of the use and value of assessment information to improve learning and the promotion of 'measurement' for accountability purposes. Torrance (2011) cautioned against these unintended consequences when assessment policies are intended to both enhance learning and improve accountability.

Fourth, while notions of the use of assessment for enhancing learning have permeated through the different versions and revisions of policies, it is only in the later policy revisions that the idea of using assessment for teacher accountability becomes more explicit. It is worth noting that the aim of the seminal Assessment Policy (DoE, 1998) was to:

introduce a shift from a system that is dominated by public examinations, which are 'high stakes' end whose main function has always been to rank, grade, select and certificate learners, to a new system that informs and improves the curriculum and assessment practices of educators and the leadership, governance and organisation of learning sites. (p. 4)

Although the results of the Grade 12 matriculation examination have been used as an accountability tool since early 2000, the primary focus of any sanction was on the school or the school principal (Ndhlovu, Sishi, & Deliwe, 2006). The possibility of any accountability system for individual teachers first surfaced in the 2007 Assessment Policy with the requirement that teachers had to maintain portfolios of their work and that these, 'portfolios should be available on request at all times for moderation and accountability purposes' (DoE, 2007, p. 17), although no specific information was provided on how this would have been implemented. The first clear indication of a system for teacher accountability was noted in the 2010 version of the Action Plan 2014 that was released for public comment (DBE, 2010). This is the first official document from the DBE to raise the subject of incentives and sanctions. For schools, the Action Plan 2014 notes that 'ANA has not been used nor will it be used to shame schools that do not perform well, nor will it be used as a basis for providing physical or monetary rewards to schools that perform well' (p. 47).

However, for teachers, the Action Plan 2014 argues for establishing, ‘transparent and fair procedures to incentivise good teaching, in monetary but also non-monetary terms, and to deal with under-performance, both through support and, where necessary, discipline’ (DBE, 2010, p. 59). No details were provided on how this will be implemented in practice. It is worth noting that in their work with Kenyan teachers, Glewwe, Ilias, and Kremer (2010) found no increase in learning due to incentivising teachers, and there is no reason to expect anything different in the South African context.

In the final version of the Action Plan 2014 (DBE, 2012a), all references to teacher rewards and sanctions linked to the ANA have been removed. Instead, the Action Plan 2014 promotes a system for incentivising teacher development. Specifically, Action Plan 2014 (DBE, 2012a) argues for strengthening teacher accountability using a points-based system to monitor teacher development, and notes that ‘one relatively straightforward way of incentivising teacher development through financial means, is to pay teachers a bonus for passing, for instance, a subject content examination’ (p. 112). In addition, while the Action Plan 2014 also calls for a system of testing teachers, the intention is to determine ‘both subject knowledge and knowledge in pedagogics and teaching methodologies’ (DBE, 2012a, p. 56) based on an anonymous sample of teachers, with no explicit link made between the teacher tests and the teacher accountability system. However, notions of a test-based accountability system for teachers still prevail, though not explicitly stated as in the first version (DBE, 2010). In this regard, the Action Plan 2014 (DBE, 2012a) notes that:

more high-stakes links between performance and pay increments continue to be explored by the employer and teacher unions. Practices elsewhere suggest that the most effective route to take for larger incentives is to provide once-off rewards to all teachers in those schools that demonstrate an improvement in learner performance from one year to the next. (p. 112)

Only time will tell whether such systems will be introduced into the education landscape in South Africa.

6. Conclusion

The development of an effective assessment policy for improving learning and teaching has been one of the major challenges the schooling sector faces in post-apartheid South Africa. From the outset, this has been an area of neglect, the effect of which had been transmitted over the years across the different policy review and revision processes. Jansen’s (2001) depiction of policy as symbolism aptly describes the seminal assessment policy. However, while revisions of the assessment policy continue to advocate for a formative use of assessment information, they promote the implementation of the summative use of assessment, relegating the former to the category of ‘symbolic policy’. This is manifested in the form of CASS, with the privileging of formal testing over informal assessment, and thereby promoting a discourse of reporting and recording as opposed to a discourse of using assessment for improving learning and teaching.

At the same time, the policies incrementally introduced notions of accountability, for schools and teachers, culminating in the census-based ANA and the Action Plan 2014’s targets, although no rewards or sanctions have been linked to these targets.

However, missing from the policy development process and the resulting discourse on assessment practices is the task of effective implementation, and in particular, the provision of appropriate guidelines, and the training of teachers. Despite the overwhelming evidence regarding the challenges teachers face in the implementation of the policy, teacher preparation and support have been wholly inadequate (DBE, 2009; DoE, 2000, 2005; Pryor & Lubisi, 2002; Spreen & Vally, 2010). Across all school types and qualification levels, teachers still struggle to meet the demands of the assessment policy, and in particular, to effectively use assessment for improving learning in the classroom (Kanjee & Croft, 2012). At the very least, this challenge has to be effectively addressed if the key goal of improving quality for all children in South Africa is to be achieved.

Notes

1. Nitko and Brookhart (2011) define tests as, 'an instrument or systematic procedure for observing and describing one or more characteristics of a student using either a numerical scale or a classification scheme' (p. 5); measurement as, 'a procedure for assigning numbers (usually a score) to a specific attribute or characteristic of a person in such a way that the number describes the degree to which the person possesses the attribute' (p. 6); and evaluation as, 'a process for making a value judgment on the worth of a student product or performance' (p. 6).
2. Where 4 = learner's performance has exceeded the requirements for the learning area and grade, 3 = satisfactory performance, 2 = partially satisfied requirements and 1 = had not met the requirements.
3. SACMEQ refers to the Southern African Consortium for Monitoring Education Quality; and TIMSS refers to the Trends in Mathematics and Science Study.
4. This document was produced by the department of education unit of the ruling party, the ANC. It was the culmination of a widespread public consultation and participation in the policy process prior to 1994, and outlined the vision and broad objectives for a post-apartheid education and training system (Sayed & Jansen, 2001).

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