

**A LANGUAGE PROGRAMME EVALUATION:
ENGLISH AS LANGUAGE OF LEARNING AND TEACHING**

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ABSTRACT

This study evaluates a teacher development course on the use of English as the language of learning and teaching (LoLT). The course was developed and implemented in a sample of Intermediate Phase classrooms in four rural primary schools of the Free State Province. The course was a language intervention programme in an integrated district development project funded by the Flemish Government. The project was implemented from 2002 to 2004. The course was developed and implemented by Sacred Heart College Research and Development Unit in collaboration with the School of Languages of the North-West University.

The course aimed at developing teachers' knowledge and skills in using learners' basic interpersonal communication skills in their home languages and in English to develop their English cognitive academic proficiency. It practically demonstrates communicative language teaching, co-operative learning and reflective practice.

The evaluation of the English as LoLT Course explored the multiple perspectives of its evaluation audience; the interrelatedness of the course content and the learning milieu; planning, learner participation and assessment in Outcomes-based education (OBE), teaching practice, and the conceptual development and transfer of English in everyday communication and as the LoLT. The findings and recommendations of the study highlight the need to develop teachers' own English language usage and their participation in professional working groups to develop their knowledge and skills as facilitators, reflective practitioners, and curriculum developers.

In addition, the study evaluates the Context Adaptive Model (Lynch, 1996; 2003) selected to guide the evaluation of the English as LoLT Course at a meta-evaluation level. The validation of the language programme evaluation model is mainly related to the epistemological claims of utilitarian pragmatism and interpretivism in programme evaluation research. The ability of the model to facilitate valid findings according to these epistemological claims in the evaluation of the English as LoLT Course is evaluated. Core criteria of flexibility, appropriateness, clarity of description and clarity of logic were identified and used to evaluate the language programme evaluation model.

The findings and recommendations of the study attempt to offer a response to the need for quality assured language learning programmes in teacher development, especially for programmes in the use of English as a LoLT in the multilingual and multicultural rural context of South Africa.

Keywords:

English language learning; language of learning and teaching, language programmes, language programme design, concept transfer, language programme evaluation, meta-evaluation, communicative language teaching; co-operative learning, Outcomes-based education, teacher development.

OPSOMMING

Hierdie studie evalueer 'n onderwyserontwikkelingskursus oor die gebruik van Engels as taal van leer en onderrig ("language of learning and teaching") (LoLT). Die kursus is in 'n steekproef van Intermediêre Fase-klaskamers in vier plattelandse laerskole van die Vrystaat Provinsie ontwikkel en geïmplementeer. Die kursus was 'n taalintervensieprogram in 'n geïntegreerde distriksonwikkelingsprojek, wat deur die Vlaamse regering befonds is. Die projek is vanaf 2002 tot 2004 geïmplementeer. Die kursus is deur die navorsings- en ontwikkelingseenheid van Sacred Heart College ontwikkel en geïmplementeer, in samewerking met die Skool vir Tale van die Noordwes-Universiteit.

Die kursus was gerig op die ontwikkeling van onderwysers se kennis en vaardighede in die gebruik van leerlinge se basiese interpersoonlike kommunikasievaardighede in hul huistale en in Engels om sodoende hul Engelse kognitiewe akademiese taalvaardighede te ontwikkel. Die kursus demonstreer praktiese kommunikatiewe benadering tot taalonderrig, samewerkende leer- en oordenkingspraktyk.

Die evaluering van die Engels as LoLT-kursus het die veelvoudige perspektiewe van die evalueerders ondersoek, asook die onderlinge verband van die kursusinhoud en die leeromgewing, beplanning, leerlingdeelname en waardebeoordeling in uitkomsgebaseerde onderwys (UGO), en die begripsonwikkeling en oordrag van Engels in alledaagse kommunikasie en as taal van onderrig en leer. Die bevindinge en aanbevelings van die studie lig die behoefte uit om onderwysers se eie Engelse taalgebruik te ontwikkel asook hulle deelname aan professionele werkgroepe om hulle kennis en vaardighede as fasiliteerders, denkende praktisyne en kurrikulumontwikkelaars te ontwikkel.

Hierbenewens evalueer die studie die konteksaanpassingsmodel ("Context Adaptive Model") (Lynch, 1996; 2003) wat gekies is om as riglyn vir die beoordeling van die Engels as LoLT-kursus op 'n meta-evalueringsvlak te dien. Die bekragtiging van die taalprogramevalueringsmodel hou hoofsaaklik verband met die kenteoretiese aansprake van utiliteitspragmatisme en interpretivisme in programevalueringsnavorsing. Die vermoë van die model om geldige bevindinge volgens hierdie kenteoretiese aansprake te fasiliteer in die evaluering van die Engels as LoLT-kursus word geëvalueer. Kerneienskappe van buigsaamheid, toepaslikheid, en duidelikheid van beskrywing en van logika is geïdentifiseer en gebruik om die taalprogramevalueringsmodel te evalueer.

Die bevindinge en aanbevelings van die studie poog om 'n antwoord op die behoefte aan kwaliteitsversekerde taalaanleerprogramme in onderwyserontwikkeling te bied, veral vir programme in die gebruik van Engels as LoLT in die veeltalige en multi-kulturele plattelandse konteks van Suid-Afrika.

Sleutelwoorde:

Aanleer van Engels; taal van leer en onderrig, taalprogramme; taalprogramontwerp; konsepoordrag; taalprogramevaluering; meta-evaluering; kommunikatiewe taalonderrig; samewerkende leer; uitkomsgebaseerde onderwys; onderwyserontwikkeling.

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CHAPTER 1

INTRODUCTION

1.1 Introduction

This study evaluates the English as Language of Learning and Teaching Course for Grades 4 – 6 (Intermediate Phase) teachers in the Thabo Mofutsanyana District of the Free State Province of South Africa. In addition, a meta-evaluation dimension is introduced. The study selects and evaluates a language programme evaluation model according to identified core criteria.

1.2 Problem Statement

The problem statement of this study arises from an ever-increasing urgency in the need for effective language intervention programmes and language programme evaluation models expressed in the South African context.

Research on language intervention programmes in South African classrooms conducted by the National Department of Education (2000b:3) has expressed a serious concern that “positive models are not being replicated and that work is dissipated and ad hoc”. This problem indicates a need for the systematic evaluation of innovative language programmes in South African classrooms to identify and replicate models of best practice.

The urgent need for innovative language programmes in teacher training, especially for programmes on the effective use of the language of learning and teaching (LoLT) in classrooms has been expressed for some time (Barkhuizen & Gough 1996:463; Lemmer 1995:94). In addition, the need to improve teachers’ knowledge and skills in using English as the language of learning and teaching has become urgent because of its status as the language of learning and teaching (LoLT) in most South African schools (Uys, 2005:1).

The growing urgency to develop effective language learning and teaching programmes is reflected in the National Policy Framework for Teacher Education and Development in South Africa (DoE, 2007a:29). The policy clearly indicates its support for language development initiatives as follows: “Programmes that will improve teachers’ competence in the language of learning and teaching, and in the teaching of literacy and reading skills in all phases, will be supported.”

The need to design valid programme evaluations that provide systematic and relevant data to policy makers and to prospective funding agencies about intervention programmes has therefore increased. The transformation of the South African education context since 1994 has

augmented the need for informed decisions to be made by policy makers and funding agencies about the replication and/or development of education programmes which will enhance the quality of learning and teaching in South African classrooms.

The research project on a framework for language intervention in the classroom conducted by the National Department of Education (2000b:3) has furthermore emphasised the need for applied research in the LoLT: "Action-based research is also required in order to support the Language-in-Education Policy and to provide models for using different languages in the classroom, using code-switching effectively and for using human and physical resources inside and outside the classroom." This statement highlights the need for whole school language intervention programmes that involves teacher participation in collaborative action research (Burns, 2005:247; Mackey & Gass, 2005:220) (cf. Chapter 8, Section 8.2.6).

In addition, the need for systematic research on the design and practical application of education evaluation programmes, particularly of language programmes, has given rise to discussions about programme evaluation approaches, strategies and models in the field of evaluation research. Evaluation has developed a legitimacy of its own as a field of applied research (Stufflebeam, 2001; Parlett & Hamilton, 1975:142; Patton, 1990:11; De Vos, 2001:373-392; Nunan, 1993:193; Lynch, 1996:9-11, 2003:1-13).

The "quantitative-qualitative" debate (cf. Lynch, 1996, 2003; Patton, 1990; Guba & Lincoln, 1994; Greene, 2000; De Vos, 2001) in the research literature calls for an exploration of these different approaches to programme evaluation. Researchers have come to view this distinction as somewhat simplistic (Mackey & Gass, 2005:2; Creswell, 2003:4). According to Creswell (2003:4), the situation is "less quantitative *versus* qualitative and more how research practices lie somewhere on a continuum between the two". Second language researchers are increasingly taking the fact into account that data can be collected "using a wide range and combination of methods" (Mackey & Gass, 2005:307). This study explores the complexities of using a mixed form of enquiry (Lynch, 2003:27-8).

However, the predominance of either a quantitative or a qualitative approach to research practice remains. According to Creswell (2003:4), studies tend to be more quantitative or qualitative in nature. This study adopted a more qualitative approach as a case study of a language programme intervention (cf. Chapter 2, Section 2.3: Table 1). The study followed a mixed research strategy which is predominantly interpretivist (cf. Figures 1; 3). Lynch (2003:7) explains that the design of a programme evaluation in the interpretivist research paradigm emerges and evolves from the programme setting.

This case study is set in the South African education and research development context. It evaluates the design, implementation and impact of an English as LoLT intervention programme. It took place in four of ten primary schools that participated in a rural development project in Phuthaditjhaba in the Thabo Mofutsanyana District from 2002 to 2004. President Thabo Mbeki identified this district as one of the nodes for rural development in South Africa.

The Integrated District Development Project (IDDP) was funded by the Flemish Government in support of an intervention initiative of the Free State Department of Education. The overall focus of the IDDP was the development and implementation of education intervention programmes at district, school management and classroom level to improve the quality of curriculum delivery in Mathematics, Science and Technology in the Intermediate Phase.

The development of a programme for English as the LoLT took shape as a specific intervention focus for Intermediate Phase Mathematics, Science, Technology and English teachers in the ten project schools. Four of the ten primary schools participated in the English as LoLT Course. These four schools had a complete Intermediate Phase complement and therefore best served the purpose of this intervention initiative.

According to Patton (1990:11), evaluation is applied research that informs action, enhances decision making, and applies knowledge to solve problems. This study asks the following evaluation research questions:

- How effective was the English as LoLT Short Course?
- How effective was the language programme evaluation model selected for the evaluation of the English as LoLT Short Course?
- Which criteria were used to evaluate the language programme evaluation model?
- Which recommendations can be made for the evaluation of future LoLT courses?

1.3 Purpose of this Study

The purpose of the language programme evaluation is derived from the need to conduct the evaluation expressed in the problem statement. The purpose also stems from an attempt to answer the research questions posed above.

The general purpose of this study is therefore to evaluate:

- the effectiveness of the English as LoLT Course;
- the effectiveness of the language programme evaluation model selected to evaluate the English as LoLT Course.

The specific aims of the study reflect the various stages of this programme evaluation (cf. Figure 1). These aims are to:

- analyse the broader context of the study for the design of the intervention programme;
- identify the needs of the Intermediate Phase teachers using English as the LoLT to inform the design of the language programme;
- verify the alignment of the English as LoLT Course design with the teachers' needs ;
- verify the appropriateness of the course scope and level;
- monitor the implementation process of the English as LoLT Course;
- evaluate the response of the English as LoLT Course to the Intermediate Phase teachers' needs during its implementation phase;
- evaluate the impact of the English as LoLT Course.

In so doing, the study also attempts to offer descriptions of best practices and make recommendations for:

- future English as LoLT programmes;
- the selection of language programme evaluation models;
- core criteria for the evaluation of language programme evaluation models.

1.4 Method of Research

The method of research is informed by a literature survey in the following areas that are relevant to the study: qualitative and quantitative research and evaluation research; language programme evaluation approaches and methods; and meta-evaluation. In addition, the relevant literature on second language teaching and learning, programme design and assessment will be referred to in the chapters of this thesis, where appropriate. The survey also includes relevant policy documents on the South African outcomes-based education system.

The following searches were done: EBSCO HOST (Academic Search Premier; ERIC; MLA International Bibliography, In magic Database/Text Web Publisher: RSAT, SACat via MagNet Nexus database of current and completed research projects in South Africa (HSRC).

This case study followed illuminative evaluation as its overall research strategy (Parlett & Hamilton, 1975:147) (cf. Figures 1; 3). Its eclectic and adaptable nature best accommodated the challenge of appropriately combining qualitative and quantitative data collection and analysis methods in language programme evaluation. The emphasis on an in-depth exploration of the interaction between the curriculum and the learning milieu in illuminative evaluation, further justified the selection of this research strategy for the evaluation of the English as LoLT Course (cf. Chapter 2, Section 2.4.4.7).

Pragmatism informed the underlying approach to programme evaluation in this study (cf. Chapter 2, Section 2.3.2). Practical problem solving is central to this approach (cf. Chapter 5, Section 5.2.3). It best suited the exploration of the challenges in language programme evaluation explored in this study (cf. Section 1.2). The study adopted a pragmatic stance in selecting a mixed method design (Creswell, 2003:18) for the programme evaluation. This design was nested in the predominantly interpretivist evaluation research method of the case study (cf. Figures 1; 3).

In addition, this case study was a longitudinal study which consisted of three phases. The duration of the study strengthened the appropriateness of selecting a mixed method design (Lynch, 2003:29). According to Lynch (2003:29), a longitudinal study following a mixed method design could “be thought of as successive evaluation studies employing different designs”. He provides the following example of a longitudinal study which ideally consists of three evaluations depending on the availability of funding: the first evaluation during the first six months could be set up as a quasi-experimental, positivist design. The second evaluation for the next six months (or longer) could follow an interpretivist design. The third evaluation could again follow a positivist evaluation design.

The evaluation of the English as LoLT Course as a case study consisted of three phases, a needs assessment phase, a programme implementation phase, and an impact assessment phase (cf. Figure 3). The evaluations in each phase explored mixed evaluation designs consisting of different combinations of interpretivist and positivist evaluations to produce relevant sets of qualitative and quantitative data (cf. Chapter 6, Section 6.2.2; Chapter 7, Section 7.2.2; Chapter 9, Section 9.2.2). The mixed evaluation design of each assessment phase is described in more detail in Chapter 5.

The specific aims of the language programme evaluation (cf. Section 1.4) informed these evaluations. They are defined as five *stages* in the evaluation process across the three *phases* of the case study (cf. Figure 1). The evaluation stages comprised: an analysis of the broader intervention context (Stage 1a) and a curriculum needs survey (Stage 1b); verification of an appropriate programme design (Stage 2a), scope and level (Stage 2b); monitoring of the programme implementation (Stage 3); evaluation of the programme response to teachers' identified needs (Stage 4) and an evaluation of the programme impact (Stage 5). The evaluations introduced successive rounds of quantitative and qualitative data collections and analyses in the programme evaluation process. Figure 1 in this section provides a schematic presentation of the method of research followed in the evaluation of this language programme.

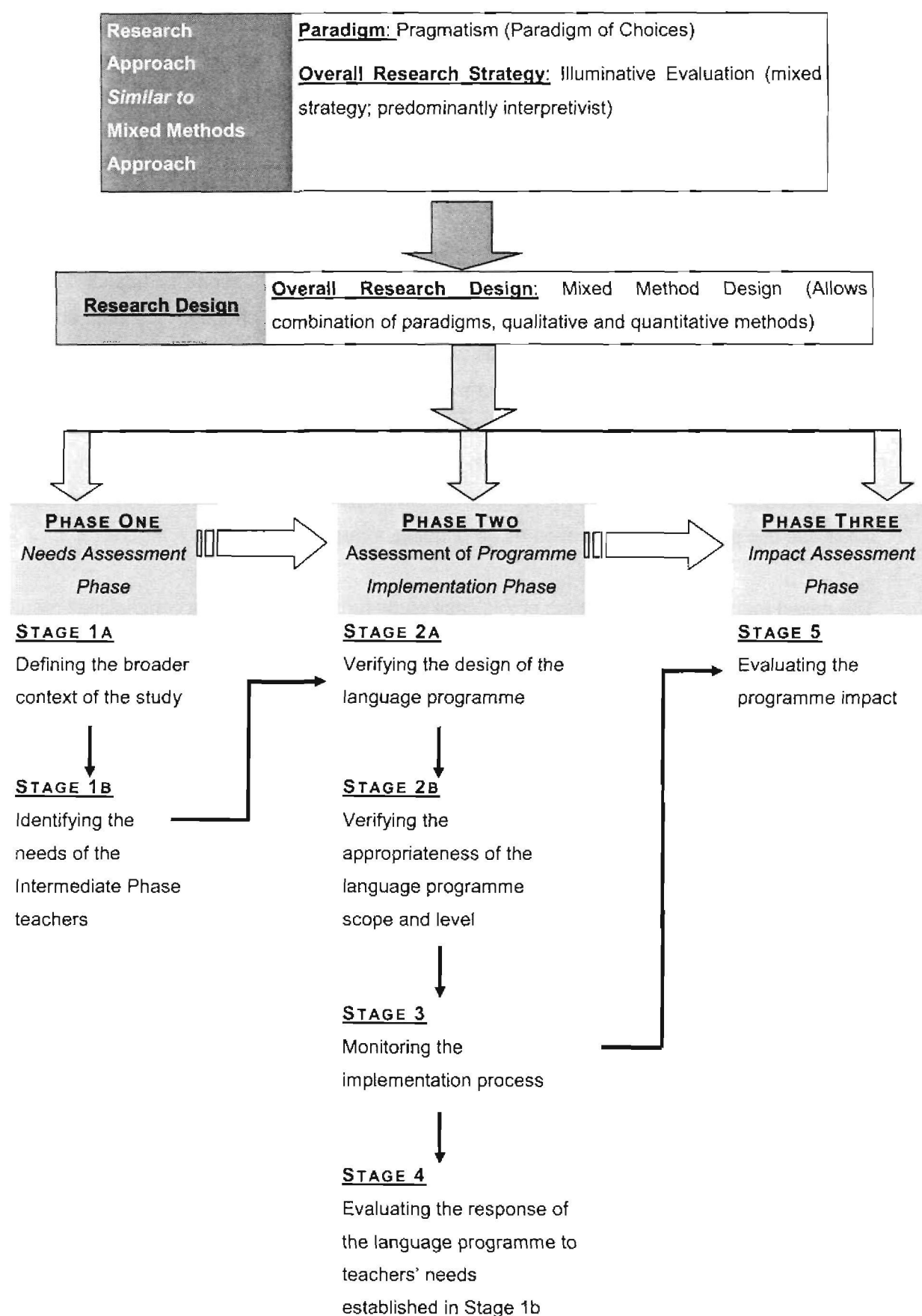
Brown (2002:15) defines programme evaluation as “the ongoing process of data gathering, analysis and synthesis, the entire purpose of which is constantly to improve each element of a curriculum on the basis of what is known about all of the other elements, separately as well as collectively”. This definition emphasises the importance of programme evaluation as a continuous process which starts with a needs analysis and follows the various stages of the language curriculum design, maintenance and impact stages. The method of research in this case study applied language programme evaluation as an ongoing process.

In addition, Brown’s (2002:15) definition highlights language programme evaluation as an interactive process where information obtained from various evaluations constantly feeds into the language programme. The information gathered about the education context and about teachers’ curriculum needs in the needs assessment phase of the case study guided the evaluation of the language programme response to these needs during its implementation phase. In turn, the impact assessment phase used the information from the previous two phases to evaluate the effectiveness of the language programme response on teachers’ identified needs. The schematic presentation of the English as LoLT Course method of research illustrates this programme evaluation as an ongoing, interactive process (cf. Figure 1).

The mixed method research design of this case study further explored the complexities resulting from interactions between a positivist evaluation design providing quantitative data and an interpretivist evaluation design providing qualitative data during its three assessment phases. However, the selection of this research design offered richer sets of information that could be used for evaluation judgements and decisions (Lynch, 2003:28).

The purpose of the study to select and apply an effective language programme evaluation model required an exploration of various programme evaluation approaches, models and criteria (cf. Chapter 2). The writer selected Lynch’s (1996:4) Context Adaptive Model (cf. Chapter 2, Section 2.4.4.7) to evaluate the English as LoLT Course (cf. Chapter 2, Section 2.4.4). In addition, four core criteria for the evaluation of the language programme model were identified (cf. Chapter 2, Section 2.5.3).

Figure 1: Schematic Presentation of the English as LoLT Course Method of Research



1.5 Programme of Study

The writer adopted the illuminative evaluation research strategy to provide strategic coherence in presenting the programme of this study. Illuminative evaluation moves in three stages from the overall exploration of the context to a more focused investigation of the programme. The movement from a general exploration to specific issues results in the identification of the most salient features of the programme and their impact within the programme, as well as in a broader context (cf. Parlett & Hamilton, 1975:148). This movement from the general to the specific, which characterises illuminative evaluation, is known as “progressive focusing” (Parlett & Hamilton, 1975:148).

The writer has applied the principle of progressive focusing in illuminative evaluation to structure the programme of this study. The programme moves from the general to the specific. The theory of language programme evaluation and of aspects of second language teaching and learning research inform the evaluations of the English as LoLT Course.

Chapter 2 describes the concepts of *evaluation* and *meta-evaluation* and how they are used in this study. The chapter discusses a theoretical framework for four major programme evaluation approaches and their validation criteria, as well as four programme evaluation models. The chapter provides a motivation for the selection of the Context Adaptive Model (cf. Lynch, 1996; 2003). It also offers a motivation for the identification of four core criteria to evaluate the selected language programme evaluation model.

Chapter 3 identifies the audience and goals of the English as LoLT Course. The first step in Lynch's (1996:4) CAM is applied to facilitate this action. The ability of the language programme evaluation model to guide the application of the first step to the evaluation of the English as LoLT Course is then evaluated in the meta-evaluation section of this chapter.

Chapter 4 explores the context and identifies preliminary themes for the evaluation of the English as LoLT Course. The application of the second and third steps in the CAM (Lynch, 1996:4) to this language programme evaluation is assessed in the meta-evaluation section of this chapter.

Chapter 5 presents a detailed description of the method of research followed in the evaluation of the English as LoLT Course as a case study. The role of the researcher in the selection of the research design is also described. The application of the fourth step in Lynch's (1996; 2003) CAM to the selection of an evaluation research design for the English as LoLT Course evaluation is critically discussed in the meta-evaluation section of this chapter.

Chapter 6 describes and evaluates the broader context identification and needs identification stages in the needs assessment phase of the case study. The application of Lynch's (1996:4) CAM to the needs assessment phase of the English as LoLT Course is evaluated in the meta-evaluation section of this chapter.

Chapter 7 presents the needs verification stage in the English as LoLT Course design, scope and level. This chapter also describes language programme monitoring in the course implementation phase.

Chapter 8 offers an evaluation of the language programme response to teachers' curriculum needs identified in the assessment phase of the case study. The application of Lynch's (1996:4) CAM to the evaluation of the programme implementation phase is assessed in the meta-evaluation section of the chapter.

Chapter 9 presents the impact evaluation stage of the language programme evaluation. This chapter describes the purpose, research design, method, data collection and analysis procedures followed in the impact assessment phase of the case study.

Chapter 10 offers a descriptive evaluation of the English as LoLT Course impact. The evaluation identifies the most effective features of the programme and traces the impact of the programme on its teaching and learning context. In addition, the application of Lynch's (1996:4) CAM to the impact assessment phase is evaluated in the meta-evaluation section of this chapter.

Chapter 11 concludes the evaluation of the English as LoLT Course. This chapter offers findings and recommendations on the effectiveness of the language programme evaluation and the language programme evaluation model. The chapter also presents a discussion of the core criteria that were used to evaluate the effectiveness of Lynch's (1996:4) CAM. The conclusions reached in the evaluation and meta-evaluation of this study are then discussed in relation to the broader context of education and language research and development.

CHAPTER 2

EVALUATION AND META-EVALUATION OF THE ENGLISH AS LoLT COURSE: A THEORETICAL FRAMEWORK

2.1 Introduction

The purpose of this chapter is to provide a theoretical framework for the evaluation and meta-evaluation of the English as LoLT Course. However, the way in which the key concepts of *evaluation* and *meta-evaluation* are used in this study is first described before the presentation of the framework.

The framework presented in this chapter moves from the general to the specific (cf. Chapter 1, Section 1.5). Discussions offered in this chapter realise Lynch's (1996:1) interpretation of applied linguistics as the application of research and practice derived from various disciplines to matters concerning the development and use of language.

The first section of this chapter defines the concepts of *evaluation* and *meta-evaluation* and how they are used in this study. The second section of the chapter presents Greene's (2000:984) categorisation of major contemporary approaches to formal programme evaluation. A general overview of programme evaluation research in the field of applied social enquiry is provided.

The general theory presented in the second section is applied to specific descriptions and discussions of four language programme evaluation models in the third section. These discussions lead to a motivation for the selection of Lynch's (1996:4) CAM as the language programme evaluation model applied to the evaluation of the English as LoLT Course. The third section of this chapter therefore provides a language programme evaluation model for the evaluation of the English as LoLT Course.

The fourth section offers an interpretation of the concept of *validity*. The interpretation of this concept is central to the meta-evaluation purpose of this study. Core criteria for the evaluation of Lynch's (1996:4) CAM are described according to the interpretation of the concept of *validity* in the epistemological claims of Greene's (2000:984) description of four programme evaluation approaches. The core criteria for the evaluation of Lynch's (1996:4) CAM also emerge from discussions on interpretations of the concepts *evaluation* and *meta-evaluation* presented in the first section of this chapter. The discussion furthermore considers the four language programme evaluation models presented in the second section of this chapter. The core criteria are then listed and linked to the meta-evaluation purpose of the study.

The concepts of *evaluation* and *meta-evaluation* are defined in the following section.

2.2 Evaluation and Meta-evaluation in the English as LoLT Course

2.2.1 The Concept of Evaluation

The interpretation of the concept of *evaluation* in the evaluation of the English as LoLT Course is not only linked to the purpose of this evaluation, but is also informed by previous interpretations of social programme evaluation in general, and by interpretations of language programme evaluation in particular. The following interpretation of the concept of *evaluation* therefore ranges from general interpretations of evaluation in social and educational programmes to a specific interpretation of evaluation in the English as LoLT Course.

Generally speaking, evaluation means “the general process of weighing or assessing the value of something”. Both Suchman and Kaplan (cited in De Vos, 2002:374) and Rea-Dickins and Germaine (1992:4) interpret evaluation as an ever-present fact of life. The evaluation process can also become a systematic process of data collection and analysis to determine the effectiveness of social and educational programmes (Patton, 1990:11; Nunan, 1993:185). The systematic evaluation of programmes is defined as evaluation research. De Vos (2002:375) defines evaluation research in social programmes as follows: “Evaluation research is the systematic application of social research procedures for assessing the conceptualization, design, implementation and utility of social intervention programmes.”

Practically speaking, Patton (1990:11) emphasises that evaluation is applied research, or a type of “action science”. Nunan (1993:185) also highlights the importance of action in his interpretation of language programme evaluation: “We collect information about language programmes not as a form of philosophical reflection, but in order to do something differently next time.”

Rea-Dickins and Germaine (cf.1992:4-22) interpret evaluation as the principled and systematic evaluation of teaching and learning, the learning process, courses, and the management of teaching. Context directly influences the purpose, scope, and findings of the evaluation. Two purposes of evaluation in the education context are, for example, justification or confirmation of existing learning and teaching practice and the introduction of innovation (planned change) in courses, materials, learning, and teaching styles. As previously mentioned (cf. Chapter 1, Section 1.4), Brown (2002:15) emphasises the interpretation of the language programme evaluation process as “an ongoing needs assessment - one based on considerably more and clearer information”.

More specifically, the interpretation of the concept of *evaluation* in the evaluation of the English as LoLT Course is realised through the application of an evaluation research strategy. The above interpretation of evaluation highlights the importance of applied evaluation research as a process of systematic data gathering and analysis, which continues to provide an increasing insight into the effectiveness of intervention programmes.

One type of applied evaluation research that fits this interpretation is referred to as *illuminative evaluation* (Parlett & Hamilton, 1975:141). Illuminative evaluation involves “an intensive study of the programme as a whole: its rationale and evolution, its operations, achievements, and difficulties”. The writer selected illuminative evaluation as the overall evaluation strategy of the English as LoLT Course. A detailed description of illuminative evaluation as an overall research strategy in the evaluation design of the case study is presented in Chapter 5, Section 5.4.

2.2.2 The Concept of Meta-evaluation

Patton (1990:147) defines *meta-evaluation* as “an evaluation of an evaluation” and provides an example of meta-evaluation (1990:148-150). The example offers a meta-evaluation of what Patton refers to as “history’s first programme evaluation”. Patton (1990:147) critiques an evaluation of Babylon’s compensatory education programme for Israeli students from a utilisation-focused perspective. This evaluation perspective links with utilitarian pragmatism (Greene, 2000:984), one of the major approaches to programme evaluation (cf. Table 1).

In addition, Patton’s (1990:147) definition and utilisation-focused application of meta-evaluation corresponds with Scriven’s (cited in Stufflebeam, 2001) interpretation of the concept. *Meta-evaluation* is defined as “any evaluation of an evaluation, evaluation system, or evaluation device” (Scriven, cited in Stufflebeam, 2001). This definition was introduced by Dr Scriven in his 1969 Educational Products Report to refer to his plan for evaluating educational products (Stufflebeam, 2001). The purpose of this meta-evaluation was to ensure the validity of the evaluation reports upon which consumers based their decisions to buy educational products for their children. Beretta (1992:19) also rates the development of language learning theories in language programme evaluation secondary to the provisioning of “user-relevant information in the short run”.

Beretta (1992:18) provides a review of second language programme evaluation since 1963. He traces the development of various language evaluation models. Beretta (1992:17) links the process element of Stufflebeam’s (1971) CIPP (Context, Input,

Process and Product) model to Parlett and Hamilton's (1975) concept of *illuminative evaluation*. This alignment corresponds with the selection of illuminative evaluation as the overall research design of the English as LoLT Course case study to apply language programme evaluation as an ongoing process (cf. Figure 1).

Beretta (1992:18) concludes his review of second language programme evaluation model-building by presenting the *Standards for Evaluations of Educational Programmes, Projects and Materials* formulated by the Joint Committee in 1981. The four evaluation standards are: utility, feasibility, propriety and accuracy. Beretta (1992:18) views the articulation of these evaluation standards as a major step in acknowledging the heterogeneity of evaluation needs and approaches in the field of education evaluation.

According to Beretta (1992:18), the utility standards relate to the duty of an evaluator to identify the stakeholder audiences and to provide them with relevant information on time. The feasibility standards require that evaluators select a programme evaluation design which is practicable or "workable in real world settings" (Beretta, 1992:18). The propriety standards demand that the evaluator behaves ethically. The evaluator must also recognise the rights of individuals who might be affected by the evaluation. The accuracy standards are concerned with the soundness of an evaluation. It requires that information is technically accurate and that conclusions are logically linked to the data.

Stufflebeam's (2001) operational definition of the concept *meta-evaluation* further emphasizes the utilisation-focused perspective in the evaluation of programme evaluations. He defines meta-evaluation as:

the process of delineating, obtaining, and applying descriptive information and judgemental information – about the utility, feasibility, propriety, and accuracy of an evaluation and its systematic nature, competent conduct, integrity/honesty, respectfulness and social responsibility – to guide the evaluation and/or report its strengths and weaknesses.

(Stufflebeam, 2001).

According to Stufflebeam (2001), the process elements in the above definition include group process tasks and technical tasks. The group process tasks of delineating and applying require the meta-evaluator to interact with the stakeholders of the evaluation to be assessed. The meta-evaluator delineates the evaluation with the evaluation audiences. He/she identifies the evaluation questions, how they will be addressed, and the reporting modes and timeframes with the evaluation audiences. The meta-evaluator also assists the evaluation audiences to understand, correctly interpret and apply the meta-evaluation findings.

Stufflebeam (2001) continues to explain his operational definition by explaining the meta-evaluation process followed in the technical tasks. The meta-evaluator performs the technical tasks to obtain and assess the information needed to judge the evaluation. These tasks require the collection and assessment of evaluation contracts, plans, instruments, data, reports and evaluator credentials. The evaluator may also use interviews, surveys and otherwise collect information and perspectives from persons involved in or affected by the evaluation process. The definition furthermore emphasises the need for descriptive and judgemental information. Stufflebeam's (1999) meta-evaluation checklist for programme evaluations requires descriptive and judgmental information for formative and summative evaluation purposes.

Stufflebeam's (2001) operational definition's basis for judging programme evaluations are: "The Program Evaluation Standards (Joint Committee, 1994) and The AEA Guiding Principles (American Evaluation Association, 1995)". Stufflebeam (2001) explicitly includes The Joint Committee Standards of utility, feasibility, propriety and accuracy for programme evaluations in his definition of meta-evaluation. He also refers to the AEA Guiding Principles in his definition. According to Stufflebeam (2001), these require that evaluations be "systematic and data based, conducted by evaluators with the requisite competence, and honest; embody respect for all participating and affected persons; and take into account the diversity of interests and values that may be related to the general and public welfare".

Stufflebeam's (2001) operational definition of meta-evaluation informs his identification of eleven tasks in the meta-evaluation process. Stufflebeam (2001) views meta-evaluation as "only a special type of evaluation". He adds that the tasks identified for the meta-evaluation process consequently apply to evaluations in general and not only to meta-evaluations. Stufflebeam (2001) identified the following eleven tasks to be used as a heuristic for use in planning meta-evaluations.

1. Determine and arrange to interact with the evaluation's stakeholders.
2. Staff the meta-evaluation with one or more qualified meta-evaluators.
3. Define the meta-evaluation questions.
4. As appropriate, agree on standards, principles, and/or criteria to judge the evaluation system or particular evaluation.
5. Issue a memo of understanding or negotiate a formal meta-evaluation contract.
6. Collect and review pertinent available information.
7. Collect new information as needed, including, for example, on-site interviews, observations and surveys.
8. Analyse the findings.

9. Judge the evaluation's adherence to the selected evaluation standards, principles, and/or other criteria.
10. Prepare and submit the needed reports.
11. As appropriate, help the client and other stakeholders interpret and apply the findings.

However, Stufflebeam (2001) highlights the following caveat. The standards included in his operational definition were developed for the United States and Canada; they should therefore not be used uncritically in the context of a different country. Moreover, Stufflebeam (2001) developed his meta-evaluation planning model for education and training programmes, as well as broader programme evaluations.

As previously stated in this section (cf. Section 2.2.1), the exploration of evaluation and meta-evaluation concepts, frameworks and models for programme evaluation moves from the general to the specific. The main relevance of Stufflebeam's (2001) general meta-evaluation planning model to language programme evaluation models lies in considering its practical application of a utilisation focused perspective to the evaluation and meta-evaluation of the English as LoLT Course.

The interpretation of the concept of *meta-evaluation* in the evaluation of the English as LoLT Course is shaped by its purpose in this study. The purpose is to assess the effectiveness of Lynch's Context Adaptive Model (cf. 1996; 2003) to guide the writer in producing a valid evaluation of the English as LoLT Course. The present discussion has highlighted the importance of a utilisation-focused approach to the meta-evaluation of the English as LoLT Course from a theoretical, as well as from an operational perspective.

The effectiveness of Lynch's (1996:4) CAM is assessed at the end of each step and phase in the evaluation process according to core criteria (cf. Chapter 1: Section 1.5). The selection of the core criteria is informed by a consideration of the research literature on programme evaluation and meta-evaluation presented here. Findings concerning the effectiveness of the language programme evaluation model as a whole are presented in Chapter 11, Section 11.3). In addition, the effectiveness of the core criteria to quality-assure the language programme evaluation model is discussed there (cf. Chapter 11, Section 11.4.).

A description of four major contemporary approaches to formal programme evaluation follows.

2.3 Major Contemporary Approaches to Formal Programme Evaluation

Greene (2000:981) introduces the categorisation presented below in Table 1 as a tool used in the field of applied social enquiry to “inform and improve the services, programmes, policies, and public conversations at hand”. Emphasis is placed on the fact that the boundaries of the four contemporary genres presented in this descriptive categorisation are clear only in their presentation.

Table 1: Major Contemporary Approaches to Formal Programme Evaluation

(Greene, 2000:984)

EPISTEMOLOGY	PRIMARY VALUES PROMOTED	KEY AUDIENCES	PREFERRED METHODS	TYPICAL EVALUATION QUESTIONS
Postpositivism (Cook, 1985)	Efficiency, accountability, cost-effectiveness, policy enlightenment	High-level policy and decision makers, funders, the social science community	Quantitative: experiments and quasi-experiments, surveys, causal modelling, cost-benefit analysis	Are intended outcomes attained and attributable to the programme? Is this programme the most efficient alternative?
Utilitarian Pragmatism (Patton, 1997)	Utility, practicality, managerial effectiveness	Mid-level programme managers and on-site administrators	Eclectic, mixed: structured and unstructured surveys, interviews, observations, document analyses, panel reviews	Which programme components work well and which need improvement? How effective is the programme with respect to the organisation's goals and mission? Who likes the programme?
Interpretivism, Constructivism (Stake, 1995)	Pluralism, understanding, contextualism, personal experience	Programme directors, staff, and beneficiaries	Qualitative: case studies, open-ended interviews and observations, document reviews, dialectics	How is the programme experienced by various stakeholders? In what ways is the programme meaningful?
Critical Social Sciences (Fay, 1987)	Emancipation, empowerment, social change, egalitarianism, critical enlightenment	Programme beneficiaries and their communities, activists	Participatory, action-oriented: stakeholder participation in evaluation agenda setting, data collection, interpretation and action.	In what ways are the premises, goals, or activities of the programme serving to maintain power and resource inequities in the context?

The descriptive categorisation of the four approaches to programme evaluation reflects the underlying assumptions of the evaluator and the evaluation audiences about the nature of the reality to be evaluated according to each approach. Typical evaluation questions are aligned with the specific epistemological framework of each genre and with the primary values promoted by each. The following four sub-sections offer a summary of each of the four major approaches to programme evaluation. The summary is mainly based on Greene's (2000:984) descriptive categorisation.

2.3.1 Postpositivism

According to Greene's summary (2000:984), the postpositivist genre promotes the primary values of "efficiency, accountability, cost-effectiveness and policy enlightenment". This approach focuses on macro policy issues of programme effectiveness, cost efficiency and accountability. Guba and Lincoln (1994:114) explain that the knowledge claims of postpositivism are based on non-falsified hypotheses viewed as facts or laws that could be used most efficiently for prediction and control when presented as generalisations or cause-effect linkages. Both Guba and Lincoln (1994:114) and Lynch (2003:3-4) emphasise the objective role of the researcher and evaluator in the postpositivist genre as a disinterested and neutral observer who informs the audiences.

Greene (2000:984) identifies high-level policy and decision makers, funders, and the social science community as key audiences in the postpositivist genre of evaluation methodologies. The description of preferred methods of evaluation focuses on essentially quantitative methods in programme evaluation such as experiments and quasi-experiments, surveys, causal modelling, and cost benefit analysis. However, Guba and Lincoln (1994:112) emphasise the addition of qualitative methods in the training of novice enquirers to correspond with their view that both quantitative and qualitative methods may be used appropriately with any research paradigm. This view is also supported by Lynch (1996:156-166; 2003:3).

Greene (2000:983) highlights the historically dominant tradition of postpositivism among theorists, methodologists, evaluation practitioners and especially among evaluation audiences. Lynch (2003:3-4) concurs with the statement that postpositivism forms the dominant paradigm of enquiry, but prefers to use the term *positivist* to *postpositivist* to describe a cluster of current, modified versions of positivism such as poststructuralism and postcolonialism.

Typical evaluation questions in the postpositivist approach focus on whether the intended outcomes are attained and whether they are attributable to the programme. Policymakers and funders are interested in the degree to which the programme has been successful in achieving the desired outcomes, while remaining cost-efficient. The question as to whether this programme is the most efficient alternative implies the presence of a control programme which typically fits the experimental method preferred in the positivist approach.

2.3.2 Pragmatism

Greene (2000:983) attributes the advent of pragmatism to the failure of experimental science to provide timely and useful answers to policy and decision makers for informed decisions about programme development and implementation. The production of useful information for decision making and management purposes is therefore a primary consideration of the pragmatist genre, which has a practical and pragmatic value base. Greene (2000:983) emphasises the utilitarian value base of pragmatism, which “embraces eclectic methods choices in the service of practical problem solving”. Patton’s (1997) utilisation-oriented evaluation is quoted by Greene (2000:983) in this respect. The practical and pragmatic value base of the pragmatist approach that prioritizes practice over paradigm and methods is also described by Lynch (1996:20). The eclectic methodological stance of evaluators based on pragmatic assumptions is classified by Creswell (2003:20) as a mixed methods approach. The eclectic and adaptable nature of Parlett and Hamilton’s (1975:141-159) illuminative evaluation research strategy to facilitate practical problem solving fits the description of the pragmatic approach selected for this study (cf. Chapter 1, Section 4.1).

Key evaluation audiences are mid-level programme managers and on-site administrators. This evaluation audience would typically want to know which programme components work well and which need to be improved. The audience would also like to be informed about the effectiveness of the programme in relation to the vision and mission of the organisation. They would be interested to know who liked the programme.

2.3.3 Interpretivism, Constructivism

The interpretivist evaluation approach focuses on providing an in-depth, contextualised understanding of the programme evaluated. Case studies are characteristic examples of a qualitative evaluation method used to describe the particular context of a programme and its contributions as an essential part of meaning

Key audiences of the interpretivist genre of evaluation methodologies comprise programme directors, staff and beneficiaries. Greene (1994:536) refers to interpretivist enquiry as “unabashedly and unapologetically subjectivist. It is also dialectic, for the process of meaning construction transforms the constructors.” Evaluators can construct rich experiential understandings of a case by responsively focusing on the priority issues of practitioners within a given programme.

Preferred methods of the interpretivist evaluation approach include interviews, observations, and document reviews. The value of pluralism in the evaluation context is promoted by focusing on programme concerns raised by various stakeholders. Typical evaluation questions would therefore be: "How is the programme experienced by various stakeholders? In what ways is the programme meaningful?" (Greene, 2000:984).

2.3.4 Critical Social Sciences

The key values promoted in the critical social sciences approach to programme evaluation are emancipation, empowerment, social change, egalitarianism and critical enlightenment. These values are the primary concern of the following key audiences: programme beneficiaries and their communities, and activists. The preferred methods of this genre are participatory and action oriented. Stakeholder participation takes place in varied structured and unstructured, quantitative and qualitative designs and methods, in historical analysis and in social criticism.

Guba and Lincoln (1994:115) describe the enquirer's subjective stance in critical theory as the voice of the "transformative intellectual" as advocate and activist. The enquirer facilitates change by developing greater insight into the existing nature and extent of individuals' exploitation who are then stimulated to take action to change the existing state of affairs. Greene (2000:985) observes that "the essential rationales for evaluation are, first, the advocacy of ideals and values and, second, the answering of programme questions. For most other evaluators, answering programme questions is the stated first priority." Particular value agendas are therefore explicitly advanced in this genre. A typical question in normative evaluations would consider in what ways the premises, goals, or activities of the programme serve to maintain the power and resource inequities in the context.

The above discussion of four major approaches to programme evaluation suggests that genres of evaluation approaches should not be distinguished primarily by their preferred methods, but rather by the key values promoted in the evaluation methodology, the key audiences and the typical evaluation questions asked. Different key questions asked express the information needs of different key audiences which, in turn, reflect varied audience orientations that represent the promotion of different values and political stances (Greene, 1994:531; 2000:985; Lynch, 2003:21).

However, Greene (2000:985) comments in her conclusive remarks about the descriptive categorisation that "the methodological domination of evaluative thinking still reigns". Greene (2000:985) argues that this is evident from the fact that "different approaches to

evaluation are still named by their primary methods, as in *qualitative evaluation* ". She concludes that it misdirects attention toward the method of the evaluation (how), instead of the purpose of the evaluation (why), to help improve the programme and to advocate for pluralism.

The discussions in the following section explore the extent to which each language programme evaluation model enables an evaluation process which not only asks how the evaluation should be done but, most importantly, why. The amount of attention paid to the interests of the key evaluation audiences (cf. Stufflebeam, 2001; Beretta, 1992) is therefore a primary consideration in the selection of a language programme evaluation model to evaluate the English as LoLT Course.

2.4 Language Programme Evaluation Models

Alderson and Beretta (1992:20) describe three basic stages followed in the programme evaluation process. The first stage involves negotiation between the evaluator and all stakeholders; the second stage describes data collection and offers an analysis of the evaluation; the third stage involves another round of negotiations in reporting back to the stakeholders. The emphasis on programme evaluation and meta-evaluation as a negotiated process between the evaluator and the evaluation audiences has become apparent (cf. Stufflebeam, 2001; Greene, 2000; Beretta, 1992) (cf. Sections 2.2.2; 2.3).

An overview of language programme evaluation models presented in Dippenaar (2004:76-83) states that the models of Pfannkuche (cited in Omaggio, Eddy, McKim and Pfannkuche, 1979:254), Dudley-Evans and St John (1998:130), Nunan (1993:196) and Lynch (1996:4) follow the three basic stages of the language programme evaluation process. A description and critical discussion of these four language programme evaluation models follows.

2.4.1 Pfannkuche's Model

Pfannkuche's model (cited in Omaggio *et al.*, 1979:254) proposes the following steps for formative evaluation:

- Identify a set of course goals and objectives to be evaluated
- Identify factors relevant to the attainment of these objectives
- For each factor in step 2, develop a set of criteria that would indicate that the objectives are being successfully attained
- Design appropriate instruments to assess each factor according to the criteria outlined

- Collect the data that is needed
- Compare data with desired results
- Check for match or discrepancy
- Prepare an evaluation report.

(Pfannkuche, cited in Omaggio *et al.*, 1979:254)

The focus on the identification of course goals, objectives, factors, and corresponding criteria in Pfannkuche's evaluation model does not pay explicit attention to negotiation with the evaluation audience. However, the identification process could be implicitly informed by an evaluation audience. The emphasis on the identification of course objectives suggests a postpositivist approach to programme evaluation. One of the key evaluation questions in the postpositivist approach is whether the outcomes attained can be attributed to the programme (Greene, 1994:531).

The following two language programme evaluation models of Dudley-Evans and St John (1998:130) and Nunan (1993:196) are presented in a question format to guide an evaluation process during which the goals are shaped by explicit considerations of audience and purpose in the selection of an evaluation design.

2.4.2 Dudley-Evans and St John's Model

Dudley-Evans and St John (1998:130) offer the following questions to be considered:

- Who is the audience and for what purpose is the evaluation done?
- Who are the stakeholders?
- Why do you want to evaluate the course?
- What do you want to change?
- What are your criteria for evaluation, and what are the objectives against which you are evaluating?
- What are the criteria for analysis of results and what will you do with the answers?
- Who will be your sources of information, such as the learners, people the learners work or study with, documents and records used, the evaluator himself, colleagues?
- When would it be appropriate to do the evaluation?

The importance of audience and purpose in language programme evaluation is highlighted as the first consideration in the design of the evaluation model. The second question could be confusing to an evaluator who may respond to the question with another question: "What is the difference between audiences and stakeholders?" Lynch

(2003:15) refers to audiences as stakeholders because the term stakeholder “reveals the notion of people who hold some sort of stake in the assessment or evaluation judgement or decision.” Greene’s (2000:982) explanation of the terms *audience* and *stakeholders* supports Lynch’s (2003:15) interpretation. According to Greene (2000:982), evaluation audiences are “groups and individuals who have vested interests in the programme being evaluated, called *stakeholders* in evaluation jargon”. The stakeholders would therefore constitute the audiences of the evaluation.

The third and fourth questions invite a dialogue with the evaluator as a participant in the evaluation process. Greene’s (2000:984) summary of major approaches to programme evaluation presents interpretivism and the critical social sciences as two separate approaches. However, the participatory role of the evaluator is evident from the evaluation questions asked in both approaches. The evaluator is therefore drawn into the evaluation as an active participant who chooses whether she or he wants to participate in the evaluation.

The fourth question about what the evaluator wants to change through the evaluation is an interesting one. The question suggests that the evaluator will be subjectively involved in the evaluation. The evaluator could then use commonly agreed upon evaluation judgements to co-construct recommendations for changes in the language programme.

The remaining questions ask the evaluator to consider the evaluation objectives and criteria, data analysis criteria, data sources, and time of evaluation. Report writing is not mentioned explicitly as part of the third stage of the evaluation process, but suggested in the question: “what will you do with the answers?”

The questions asked in Dudley-Evans and St John’s (1998:130) language programme model invite consideration of audience and purpose from an implied interpretivist paradigm. However, the vague way in which the questions are formulated could lead to confusion in the application of the model to language programme evaluation.

2.4.3 Nunan’s Language Programme Evaluation Model

The following questions posed in Nunan’s (1993:196) language programme evaluation model are clarified by a comment or detailed question:

- What is the purpose of the evaluation?
 - The aims and objectives of the research need to be clarified in the beginning.

- Who is the audience for the evaluation?
 - Different stakeholders will have different purposes and different requirements. The audience may also be subject specialists or, on the other hand, know little about the field, which will influence the way in which the research is done.
- What principles and procedures should guide the evaluation?
 - A comprehensive set of principles needs to be drawn up before research is started. All parties involved need to agree on this to prevent disagreements later in the research. These principles need to provide clear statements on the rights and responsibilities of all participants in relation to the data, outcomes and recommendations.
- What tools, techniques and instruments are appropriate?
 - A wide range of instruments and techniques is available, such as the analysis of existing information, tests, observations, interviews, meetings, and questionnaires.
- How should the data be analysed?
 - Should the analysis be statistical, interpretivist or both?
- Who should carry out the evaluation?
 - It can be done either by outsiders or by the facilitator within the course.
- When should it be carried out?
 - It can be done either during the presentation of the course (formative) or at the end of the course (summative) or both.
- What is the timeframe and budget for the evaluation?
 - The timeframe and budget must be determined in line with the requirements of the funding body.
- How should the evaluation be reported?
 - The final draft of the report needs to be circulated to the relevant parties to negotiate agreement on the findings of the report to prevent delays or problems. This can delay the final report and needs to be considered in the initial planning.

Nunan (1993:196) explicitly links audience and stakeholders in his question about the identification of the audience. This approach corresponds with Lynch's (2003:15) and Greene's (2000:982) reference to audiences as stakeholders. Nunan's (1993:196) explanatory comments on the question indicate his awareness of the diverse interests of multiple audiences who "will have different purposes and different requirements".

The clarification of roles, responsibilities and ethical responsibilities in language programme evaluation are introduced in Nunan's (1993:196) language programme evaluation model which does not appear in the models already discussed. The model advocates a negotiated evaluation process which obtains stakeholder agreement about the intended, as well as the completed evaluation.

This process relates to the evaluation question about how the programme is experienced by various stakeholders, which forms part of the interpretivist approach (Greene, 2000:984). Lynch (2003:163) argues that consent of participants, for example, should also be seen as "an ongoing negotiation process throughout the life of the evaluation". Circumstances may change, and participants' willingness and comfort with the evaluation process should be reassessed periodically.

The questions and comments in Nunan's (1993:196) language programme evaluation model accommodate an inclusive and flexible evaluation process. The inclusion of a range of evaluation methodologies is suggested in the question and comments on the evaluation methodology. Nunan's (1993:196) comment on the question as to when the language programme evaluation should be carried out accommodates more than one evaluation which could be formative, summative, or both. The emphasis on flexibility is also apparent in the suggestion that the data analysis could be statistical, interpretivist, or both.

The question on the timeframe and budget available for the evaluation highlights the matter of effectiveness and cost-efficiency in language programme evaluations. Although this consideration is essential in determining the process and the quality of the evaluation, it was not mentioned in the previous two models.

The above overview indicates the need for language programme evaluations that consider the various interests of multiple evaluation audiences and the role of the evaluator; have clarity of focus; are flexible and inclusive, yet specific.

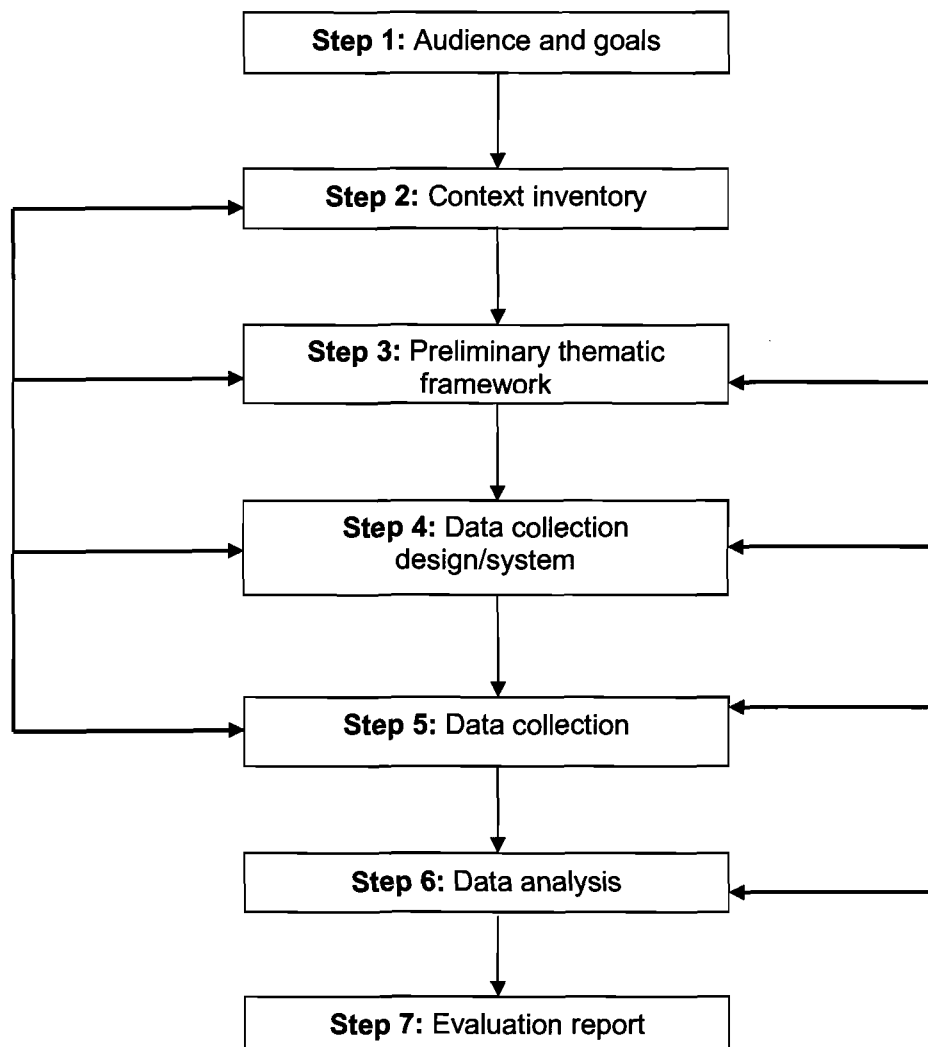
An important consideration in language programme evaluation which has not been highlighted in the three models discussed above is the impact of the learning and teaching context on the language programme. A description of Lynch's (1996:4) Context Adaptive Model (CAM) presented in the following section illustrates the role of context in language programme evaluations.

2.4.4 Lynch's Context Adaptive Model (CAM)

Lynch's (1996:4) CAM follows an evaluation process which consists of seven steps. The steps are presented in Figure 2 below.

Figure 2: The Context Adaptive Model (CAM)

(Lynch, 1996:4)



The clearly delineated steps of the above presentation might suggest that the model encourages a rigorous application of the language programme evaluation process. Contrary to this impression, Lynch (1996:3) states that the model "is meant to be a

flexible, adaptable heuristic - a starting point for inquiry into language education programmes that will constantly reshape and redefine itself, depending on the context of the programme and the evaluation." Descriptions of the CAM (cf. Lynch, 1996; 2003) emphasise the shaping influence of the language programme and evaluation context on the evaluation process. A description of each step in the evaluation process follows.

2.4.4.1 Audience and Goals

The identification of audience and goals is presented by Lynch (1996:4) as the first step of the evaluation process. Lynch (2003:15) distinguishes three levels of multiple potential audiences. The audiences are identified according to their level of involvement in the evaluation context or, differently put, according to the "various levels of stakes that various people will hold" (Lynch, 2003:15).

According to Lynch (2003:16), sponsors, funders, administrators, teachers, and students are primary level stakeholders closest to the context. These stakeholders should be consulted in determining the goals for the evaluation. Administrators, teachers, students and their families, and communities who have occasional contact with the context, or who work in settings close by, are secondary stakeholders. These audiences might be interested in how the evaluation could inform their own practice and experience. A tertiary level of stakeholders consists of administrators, teachers, students and their families, community organisations, language testers and programme evaluators who have little or no contact with the evaluation context. The tertiary level stakeholders might be interested in the results of the published evaluation report.

The various interests of the multiple evaluation audiences are reflected in evaluation questions that are typical of what they would like to know from the evaluation. Lynch (2003:16) quotes an example of the government agency that oversees the funding of the programme. The agency would want to know whether or not the programme is working to assure themselves that the money is spent wisely. The goal of the programme evaluation would then be to provide the kind of information needed to satisfy the accountability interest of the government agency as a primary stakeholder.

2.4.4.2 Context Inventory

The preliminary understanding of the evaluation context according to the involvement of the multiple audiences in the language programme and evaluation is deepened through the compilation of a context inventory. According to Lynch

(1996:5), the context inventory identifies the essential features of the programme and its setting. Illustrative examples of guiding questions to compile an inventory of, for example, the features of the language classroom or programme, characteristics of the programme participants, theoretical and philosophical influences, and socio-political and cultural issues are provided in Lynch (1996:5; 2003:18-19). The guiding questions of the latter context inventory provided in Lynch (2003: 18-19) are more extensive, although not exhaustive.

2.4.4.3 Preliminary Thematic Framework

The establishment of a preliminary thematic framework focuses the evaluation. Lynch (1996:6) reasons that information gathered about the evaluation context during the first two steps of the evaluation process could be potentially overwhelming. The third step entails a preliminary listing of evaluation themes that emerge from data on the evaluation audiences and goals, as well as on the programme and its setting. Lynch (2003:19-20) provides an illustrative list of preliminary themes that is more comprehensive than the previous list (1996:6). The second and third steps of the evaluation process presented separately in Lynch (1996:4) are presented together in Lynch (2003:17-20) as an exploratory phase in the evaluation design process.

The refinement of the model described above increases the level of specificity and the flexibility of the CAM which, in turn, could be viewed as an attempt to augment the effectiveness of this language programme evaluation model.

2.4.4.4 Data Collection Design/System

The fourth step involves the selection of a data collection design based on detailed and focused information gathered during the first three steps. In addition, Lynch (1996:7; 2003:21) highlights the significant role of the evaluator and/or the evaluation teams in the selection of the evaluation approach. The data collection design is informed by the evaluation approach. Lynch (2003:20) also refers to *approach* as *paradigm*. Lynch (1996:7) provides examples of the interaction of audience and goals, the context inventory and the preliminary thematic framework in the selection of a qualitative, quantitative or mixed data collection design. Lynch (2003:22-29) refers to qualitative data collection designs as *interpretivist evaluation designs*, to quantitative data collection designs as *positivist evaluation designs* and to mixed data collection designs as *mixed evaluation designs*.

The presentation of a convincing evaluation argument to satisfy the diverse interests of the evaluation audiences in a particular programme and its setting is concerned with the validity of the language programme evaluation. According to Lynch (2003:20), the validity of an evaluation is determined by the selection of an appropriate evaluation approach which underlies the selection of a data collection design. Lynch (2003:33-38) illustrates a variety of audience, goals, context, themes, paradigm and design interactions with four vignettes.

2.4.4.5 Data Collection and Analysis

In-depth discussions and detailed examples of quantitative and qualitative data gathering procedures and analysis are provided in Lynch (1996:92-139). The fifth and sixth steps of Lynch's (1996:4) CAM are combined in the introductory section of this book, as well as in subsequent chapters. Lynch (2003:41-75, 118-133) separates the fifth and sixth steps. He devotes entire chapters to provide descriptions of quantitative data collection procedures, referred to as *measurement procedures*, and of qualitative data collection procedures, named *interpretive procedures*. Lynch (2003:76-117, 134-147) offers a variety of examples and discussions of measurement data analysis and of interpretivist information analysis in these chapters.

The change in terminology highlighted in the above descriptions of data collection, design, gathering, and analysis suggest an emphasis on the purpose of the evaluation rather than on the primary methods (cf. Greene, 2000:985). The refinement of Lynch's (1996:4) CAM in the second book therefore facilitates an evaluation process that focuses on the purpose(s) of the evaluation determined by the various interests of the multiple evaluation audiences (cf. Section 2.4.4.1).

In addition, the refinement of Lynch's (1996:4) CAM illustrates an increased level of specificity in the amount of detail and variety provided on the methods of evaluation. The emphasis on the evaluation purpose does not reduce the significance of the method of research to provide convincing evidence of the evaluation to the multiple audiences. The effectiveness of the model to provide clear guidelines for the collection of convincing evidence consequently increases the validity of the evaluation process.

2.4.4.6 Evaluation Report

The final step in Lynch's (1996:4) CAM highlights the importance of sensitivity to the audience and goals of the evaluation as does Nunan's (1993:196) language

programme evaluation model. The political and social dimensions of the evaluation context identified in the context inventory need to be considered when writing the report. Lynch (1996:9) highlights the communication of selective information to the different stakeholders in the multiple evaluation audience in the interest of communicating the results effectively. Multiple reports that emphasise different types of information may be provided. These reports may differ in form and content to address the vested interests of the primary level multiple audiences.

2.4.4.7 Motivation for the Selection of Lynch's CAM

The emphasis on the identification of the multiple evaluation audiences according to their involvement in the evaluation context distinguishes Lynch's (1996:4) CAM from the other three language programme evaluation models (cf. Section 2.4). The model consequently has the best potential to facilitate an evaluation focus on the interaction between audience and context. This evaluation focus could also facilitate the evaluation standard of feasibility to ensure that the evaluation design negotiated with the evaluation audiences is practicable in the evaluation context (Beretta, 1992:18; Stufflebeam, 2001).

In addition, the model highlights a participatory approach to language programme evaluation. Lynch's (1996:4) CAM specifies the identification of audience interests and goals as the first step in programme evaluation (cf. Section 2.4.4.1). The identification and consideration of the evaluation audiences' interests are also considered as a central focus in Greene's (2000:985) categorisation of four major approaches to programme evaluation. This language programme evaluation model also promotes a Guiding Principle of the American Evaluation Association in programme evaluation (cf. Stufflebeam, 2001). Lynch's (1996:4) prioritisation of the evaluation audiences' interests and goals corresponds to the guiding principle of taking into account the "diversity of interests and values that may be related to the general and public welfare".

The second and third steps of Lynch's (1996:4) CAM could initiate an evaluation process of progressive focusing on the evaluation context and on the evaluation themes of the English as LoLT Course. This process links the programme evaluation with the illuminative evaluation research strategy, which explores the impact of the learning milieu on the curriculum (Parlett and Hamilton, 1975:148) (cf. Chapter 1, Section 1.4). The selected language programme evaluation model is therefore in line with the overall research strategy of this language programme evaluation (cf. Figure

1). An exploration of the evaluation context is not highlighted in the other language programme evaluation models (cf. Sections 2.4.1-3).

In addition, the second step of Lynch's (1996:4) CAM invites an in-depth exploration of the multiple dimensions in the learning and evaluation context. This emphasis on understanding the evaluation context promotes an interpretivist approach to language programme evaluation. Lynch's (1996:4) CAM is consequently aligned to the predominantly interpretivist approach in the evaluation of the English as LoLT Course as a case study.

The flexible and adaptable nature of Lynch's (1996:4) CAM could facilitate the application of Creswell's Mixed Methods Approach (2003:18) to the evaluation of the English as LoLT Course. The detailed presentation of both positivist and interpretivist approaches, data collection designs, procedures, and analyses promotes a mixed evaluation design. The intention of this model to constantly reshape and redefine itself to suit the evaluation context is further reflected in Lynch's (cf.1996; 2003) consideration and presentation of mixed method data collection designs, procedures and analyses.

The promotion of mixed evaluation designs could increase the validity of the evaluations in the English as LoLT Course based on richer qualitative and quantitative data sets. Lynch's (2003:28) following comment illustrates this motivation: "Even though the evaluation team will normally be committed to, or guided by, a particular paradigm, an attempt at a mixed design can offer a richer set of information from which to make evaluation judgements and decisions". The flexibility and adaptability of the model could facilitate the programme evaluation standard of accuracy (cf. Beretta, 1992:18; Stufflebeam, 2001) in providing convincing evaluation arguments based on richer sets of data.

In addition, the design of Lynch's (1996:4) CAM could facilitate the validation of this language programme evaluation. The explicit alignment of the evaluation purpose(s), context, and themes to the data collection approach, design, procedures, and analyses in the first six steps of Lynch's (1996: 4) CAM facilitates practicable, logical and valid evaluation arguments. Lynch (1996:41-66; 2003:148-165) also provides specific guidance on the validation of language programme evaluations. The model could therefore promote the programme evaluation standards of feasibility and accuracy (Beretta, 1992:18; Stufflebeam, 2001).

However, the above motivation for the selection of Lynch's (1996:4) CAM to facilitate a valid evaluation of the English as LoLT Course needs to be evaluated in its application to the language programme. Core criteria for this meta-evaluation need to be developed.

2.5 Meta-Evaluation

The evaluation of the language programme evaluation model addresses the meta-evaluation purpose of the study according to its interpretation of the concept *meta-evaluation* (cf. Section 2.2.2).

Stufflebeam (2001) expresses the need for valid programme evaluations as follows: "Consumers need meta-evaluations to help avoid accepting invalid evaluative conclusions and, instead, to use sound evaluation information with confidence". This section explores the concept of *validity* in order to develop core criteria for the evaluation of Lynch's (1996:4) CAM to guide a valid language programme evaluation.

2.5.1 Definitions of the Concept of Validity

The definition of the concept of *validity* has a major influence on the identification of criteria for the evaluation of the CAM as a language programme evaluation model. The validity of a statement generally refers to the degree to which the statement is credible, or true. Specific definitions of validity are related to how truth is perceived from the epistemological claim that underpins an evaluation approach.

The two most influential epistemological claims of programme evaluation approaches presented in Greene (2000:984) are the postpositivist and the interpretivist claims with their respective preferred methods of quantitative and qualitative research (cf. Rea-Dickins & Germaine, 1992; Nunan, 1993; Guba & Lincoln, 1994; Greene, 1994; Brown, 2002; Leedy & Ormrod, 2001; Creswell, 2003; Lynch, 2003; Mackey & Gass, 2005).

The danger of dichotomising positivism and interpretivism in a two-category system is acknowledged by Lynch (2003:3-4). The two definitions of the concept of *validity* offered by Lynch (2003:148) are informed by the postpositivist and by the interpretivist epistemological claims presented Greene's (2000:984) descriptive categorisation of programme evaluation approaches.

Validity, according to a general definition in the postpositivist epistemological claim, is perceived as “the degree to which our conclusions or inferences are true” (Lynch, 2003:148). According to this general definition, validity is linked to an external truth that is captured through quantitative research methods based on the physical sciences which gives primacy to the discovery of causal relationships.

A general definition of validity in an interpretivist frame of reference becomes more difficult, because knowledge constructed by the act of enquiry allows for multiple truths. According to Lynch (2003:148) an interpretivist definition of validity therefore “tends to focus on the notion of credibility, or trustworthiness; it shifts from a correspondence with truth to establishing an argument that is convincing to us and to our audience”.

2.5.2 Validation Criteria According to Greene’s Four Major Approaches to Programme Evaluation

2.5.2.1 Validation Criteria in Postpositivism

Lynch (2003:155) describes four components of validity for evaluation purposes. Validity is divided into statistical conclusion validity, internal validity, construct validity and external validity. Statistical conclusion validity refers to the degree of certainty with which it can be inferred that the variables observed are related. Internal validity focuses on whether or not the observed relationship between the independent and dependent variables is causal. Construct validity looks for evidence of how well research findings can be used to make generalisations about constructs that underlie the variables investigated. External validity refers to evidence that allows generalisation of the constructs investigated to other persons, settings and times.

These criteria are the equivalents of the trustworthiness criteria in the interpretivist approach (Denzin, 1994:508). Validation in the interpretivist approach is discussed in the sub-section below.

2.5.2.2 Validation Criteria in Interpretivism, Constructivism

Trustworthiness in an interpretivist approach consists, according to Guba and Lincoln (cited in Lynch, 2003:157) of four criteria: credibility, transferability, dependability and conformability. Credibility is equivalent to internal validity, transferability to external validity, dependability to measurable reliability and confirmability to objectivity in the postpositivist approach. Denzin (1994:513) summarises the criteria and strategies as follows. Credibility is, for example,

increased through prolonged field engagement, persistent observation, triangulation and peer debriefing. Thick description provides for transferability. Denzin (1994:505) relates thick description to validity in the following way: "A thick description ... gives the context of an experience, states the intentions and meanings that organised the experience, and reveals the experience as a process. Out of this process arise a text's claims for truth, or its verisimilitude." Dependability can be enhanced through the use of overlapping methods, stepwise replications and enquiry audits. Confirmability builds on audit trails and involves the use of written field notes, memos, a field diary, process and personal notes, and a reflexive journal.

Lynch (2003:157) emphasises that the interpretivist evaluator's claim to validity does not depend on how many criteria have been met, nor on how many techniques have been used, but on the degree to which the criteria discussed build a convincing argument for the credibility and trustworthiness of the evaluator's findings. Interpretivist validity has to do with clarity and thoroughness in using and reporting the use of the techniques that enhance validity. The dilemma for interpretivist evaluation highlighted by Greene (1994:537) and Lynch (2003:156) is that it rejects prescribed notions of validity, but that evaluation audiences demand methodological assurances.

The danger that interpretivist approaches to evaluation validity could be seen to reduce knowledge claims to matters of opinion is pointed out by Lynch (2003:156). Evaluation interpretations are not linked to a universal framework of knowledge itself, but to applications of knowledge such as the liberation of people, or the taking of actions that result in social and educational reform. Lynch (2003:156) argues that validity evidence from an interpretivist approach "is the construction of an argument that will unavoidably reflect our particular theoretical, social, political and personal interests and purposes".

2.5.2.3 Validation Criteria in the Critical Social Sciences

The validity of a critical theory text is judged, according to Denzin (1994:509), by its ability to reveal reflexively the material and cultural practices that create structures of oppression, thereby creating a space for the multiple voices to speak. Criteria for a valid critical, emancipatory text are therefore that the text should be "multivocal, collaborative, naturalistically grounded in the worlds of lived experience, and organized by a critical, interpretivist theory" (Denzin, 1994:509). He concludes that active participatory research is foregrounded in critical theory, but the methodological side of the interpretive process that is central to qualitative research, is left unclear.

2.5.2.4 Validation Criteria in Utilitarian Pragmatism

Validity is defined from neither a postpositivist nor an interpretivist approach in utilitarian pragmatism. Greene (1994:537) cites the example of Patton, who offers “strategic themes” as a highly interpretivist frame for his qualitative evaluation approach, but simultaneously promotes conventional measurement validity and reliability as key quality dimensions of qualitative data.

The reason for this apparent contradiction lies in Pattons’ rejection of the idea that enquiry paradigms frame or delimit methodological choices, which he expresses as follows:

Rather than believing that one must choose to align with one paradigm or another, I advocate a paradigm of choices. A paradigm of choices rejects methodological orthodoxy in favour of methodological appropriateness as the primary criterion for judging methodological quality. The issue then becomes not whether one has uniformly adhered to prescribed canons of either logical-positivism or phenomenology but whether one has made sensible methods decisions given the purpose of the inquiry, the questions being investigated, and the resources available.

(Patton, 1990:38)

Patton (1990:39) is therefore more concerned with practical needs and situational responsiveness to validate the choice of evaluation methods, than with the alignment of a set of methods with any particular approach such as postpositivism, interpretivism or critical social sciences.

The utilitarian epistemological claim is not committed to any one system of reality, but sees truth as “what works at the time; it is not based in a strict dualism between the mind and a reality completely independent of the mind” (Creswell, 2003:12). The validity of an evaluation is therefore determined by its *usefulness*. Lynch (1996:63) refers to this validation criterion as the *utility criterion*. In addition, the validation of utilitarian pragmatism lies in its ability to motivate the *appropriateness* of a particular mixing of quantitative and qualitative methods in providing the most useful evaluation findings to satisfy stakeholders’ interests.

Guba and Lincoln (1994:108) support mixes of qualitative and quantitative methods in a particular genre of methodology, but they strongly disagree with the mixing of enquiry approaches at the paradigm level. Lynch (2003:6-7) also disagrees with the mixing of paradigms and regards the distinction between positivist and interpretivist paradigms as essential to validate the collection of evidence for evaluation findings. However, Lynch (2003:28) includes the choice of a mixed evaluation design in his CAM that would offer an “opportunity for evaluators to step outside their normal

research worldview and take a different perspective on the programme and its setting”.

2.5.3 Core Criteria Selected for the Evaluation of the Context Adaptive Model as an Evaluation Model of the English as LoLT Course

The validation criteria from utilitarian pragmatism and interpretivism (cf. Table 1) mainly informed the selection of evaluation criteria to assess the effectiveness of Lynch's (1996:4) CAM to guide a valid evaluation of the English as LoLT Course.

In addition, the importance of utilitarian pragmatism and interpretivism in the overall research strategy of this case study was considered in the selection of core meta-evaluation criteria. The evaluation standards for education programme evaluations (cf. Beretta, 1992; Stufflebeam 2001) were also considered. A description of the core criteria follows.

2.5.3.1 Flexibility

The validation criterion of usefulness in utilitarian pragmatism (cf. Table 1) and the evaluation standard of utility (Stufflebeam, 2001) require flexibility in language programme evaluation. Lynch's (1996:4) CAM consequently needs to allow for the selection of a variety of approaches and methods to address the various evaluation interests and goals of the multiple evaluation audiences usefully.

Lynch's (1996:3) claim for the validation of his Context Adaptive Model (CAM) rests on its ability to be flexible: “Rather than a rigid model to be tested for validity using experimental research design and appropriate statistical techniques, it is meant to be a flexible, adaptable heuristic – a starting point for inquiry into language education programmes that will constantly reshape and redefine itself, depending on the context of the programme and the evaluation.”

The criterion of flexibility is also compatible with the evaluation standards of feasibility and accuracy in education programme evaluation (Beretta, 1992:18; Stufflebeam, 2001). A flexible approach to the evaluation of the English as LoLT Course promotes its feasibility in ensuring that the evaluation tailors “methods and instruments to information requirements” (Stufflebeam, 1999). Flexibility in a language programme evaluation also allows for a variety of data collection and analysis procedures to increase the accuracy of the conclusions. One of the checkpoints to ensure accuracy in Stufflebeam's (1999) meta-evaluation checklist

indicates that the evaluation should “employ multiple measures to address each question”.

2.5.3.2 Appropriateness

The inclusion of this core criterion to evaluate Lynch’s (1996:4) CAM quality assures that the language programme evaluation model facilitates an appropriate and relevant evaluation of the English as LoLT Course.

The following example, taken from a discussion on the quality assurance of English language teaching in Britain (Thomas, 2003:234-241), explains the link between appropriateness and quality assurance in this study.

Thomas (2003:238-240) distinguishes between fitness for purpose and fitness of purpose in quality assurance. According to Thomas (2003:238), *fitness for purpose* refers to the quality assurance of English language teaching according to standards of what is “considered to be fit for the purpose of teaching English as a foreign language in Britain”. *Fitness of purpose* examines the relevance of the language programme to the needs of the students and to the society.

Similarly, the evaluation of Lynch’s (1996:4) CAM examines its fitness for the purpose of facilitating a valid language programme evaluation. The evaluation considers the model’s fitness of purpose or relevance to guide the evaluation of the English as LoLT Course as a case study. According to Greene’s (2000:984) descriptive categorisation of major evaluation approaches, the case study is a preferred method of the interpretivist approach.

Leedy and Ormrod (2001:165) offers a list of eight standardised evaluation criteria for interpretivist research. The eight criteria are: purposefulness, explicitness of assumptions and biases, rigour, completeness, coherence, persuasiveness, consensus and usefulness.

A description of the eight criteria follows:

1. **Purposefulness.** The research question drives the methods used to collect and analyse data, rather than the other way round.
2. **Explicitness of assumptions and biases.** The researcher identifies and communicates any assumptions, beliefs, values and biases that may influence data collection and interpretation.

3. **Rigour.** The researcher uses rigorous, precise, and thorough methods to collect, record, and analyse data. The researcher also takes steps to remain as objective as possible throughout the project.
4. **Completeness.** The researcher depicts the object of the study in all its complexity. The researcher spends sufficient time in the field to understand the nuances of the phenomenon; describes the physical setting, behaviours, and perceptions of the participants; and gives readers a total, multifaceted picture of the phenomenon (i.e. a thick description).
5. **Coherence.** The data yield consistent findings, such that the researcher can present a portrait that “hangs together.” Multiple data sources converge onto consistent conclusions (triangulation), and any contradictions within the data are recorded.
6. **Persuasiveness.** The researcher presents logical arguments, and the weight of the evidence suggests one interpretation to the exclusion of others.
7. **Consensus.** Other individuals, including the participants in the study and other scholars in the discipline, agree with the researcher’s interpretations and explanations.
8. **Usefulness.** The project yields conclusions that promote better understanding of the phenomenon, enable more accurate predictions about future events, or lead to interventions that enhance the quality of life.

(Leedy & Ormrod, 2001:164-165.)

The above interpretivist programme evaluation criteria (Leedy & Ormrod, 2001:164-5) promote the evaluation standards of accuracy, propriety, utility and feasibility (Beretta, 1992:18; Stufflebeam, 2001). An emphasis on rigour, completeness and coherence facilitates accuracy. A focus on explicitness of assumptions and biases promotes propriety; an emphasis on persuasiveness, consensus and usefulness promotes utility; and an emphasis on purposefulness promotes feasibility.

2.5.3.3 Clarity of Description

The core criterion of clarity of description increases the reliability of a programme evaluation in all four major approaches to programme evaluation. The discussion of language programme evaluation models (cf. Section 2.4) has emphasised the need for clear and specific description in language programme evaluation. This meta-evaluation criterion assesses whether Lynch’s (1996:4) CAM facilitates an English as LoLT Course evaluation that responds to the education evaluation standard of accuracy (Beretta, 1992:18; Stufflebeam, 2001) and the interpretivist evaluation standard of rigour (Leedy & Ormrod, 2001:164-5).

2.5.3.4 Clarity of logic

Beretta (1992:18) comments on the importance of providing conclusions that are logically linked to the data in order to comply with the evaluation standard of accuracy. The evaluation question will be whether the CAM (Lynch, 1996:4) follows a clear logic, or line of argument, in the description of the seven steps outlined for language programme evaluation. The criterion of clear logic seems to suggest that only linear logic could be considered as valid. What is meant by clarity of logic is, however, to evaluate whether the evaluation process has been followed through consistently, irrespective of whether a linear or an iterative route was followed. A clear line of logic promotes the interpretivist criterion of persuasiveness (Leedy & Ormrod, 2001:164-165) and the education evaluation standard of utility (Beretta, 1992:18; Stufflebeam, 2001) in programme evaluation.

The following sub-section briefly lists the selected core criteria for the evaluation of Lynch's (1996: 4) CAM as a language programme evaluation model applied to the evaluation of the English as LoLT Course.

2.5.3.5 Listing of Core Criteria for the Evaluation of Lynch's CAM

The effectiveness of each step of the evaluation process in Lynch's (1996:4) CAM, as well as the model's overall effectiveness to guide a valid language programme evaluation, is therefore evaluated according to the following core criteria:

- flexibility,
- appropriateness,
- clarity of description, and
- clarity of logic.

The core criteria are applied to the evaluation of Lynch's (1996:4) CAM according to the interpretation of each criterion described in the previous sub-section.

Each meta-evaluation section concludes with reflexive comments on the effectiveness of Lynch's (1996:4) CAM to guide a valid language programme evaluation process. Beretta (1992:1) emphasises the importance of reflexive comments "to foster a self-reflecting attitude in researchers already involved in evaluation and to provide useful input to teacher-training programmes".

2.6 Conclusion

This chapter has provided a theoretical framework for the evaluation and meta-evaluation of the English as LoLT Course. The first section discussed and clarified how the concepts *evaluation* and *meta-evaluation* are used in this study.

The second section of the chapter presented Greene's (2000:984) descriptive categorisation of positivism, utilitarian pragmatism, interpretivism and constructivism, and critical social sciences as four major current approaches to programme evaluation. The writer selected a pragmatic approach (cf. Section 2.3.2) to the English as LoLT Course evaluation. This approach would enable the evaluation to assess the course components that worked and those that still needed to be refined. The eclectic and adaptable nature of illuminative evaluation provided an evaluation research strategy that suited the problem solving approach of utilitarian pragmatism. In addition, the general theory presented in the second section was applied to specific descriptions and discussions of four language programme evaluation models.

The interpretation of the concepts evaluation and meta-evaluation; the analysis of the theoretical framework for programme evaluation and the discussions of four language programme models have led to the selection of Lynch's (1996:4) CAM to evaluate the English as LoLT Course. The third section of this chapter therefore provided a language programme evaluation model for the evaluation of the English as LoLT Course. The motivation for the selection of Lynch's (1996:4) CAM was provided in Section 2.4.4.7.

The fourth section offered a detailed interpretation of the concept of *validity* according to Greene's (2000:984) description of the postpositivist, utilitarian pragmatist, interpretivist and constructivist, and critical social sciences epistemological claims. The selection of core criteria for the evaluation of Lynch's (1996:4) CAM was motivated by the interpretations of the concept of *validity* according to these four epistemological claims. The core criteria of flexibility, appropriateness, clarity of description and clarity of logic structure the evaluation of the selected language programme evaluation model.

The next chapter presents the application of the first step in Lynch's (1996:4) CAM. The identification of the interests and goals of the IDDP and the English as LoLT Course evaluation audiences is described. The effectiveness of the first step in Lynch's (1996: 4) CAM to provide guidelines for the identification of the evaluation audience and goals is then considered. This evaluation addresses the meta-evaluation purpose of the study in Chapter 3.

CHAPTER 3

EVALUATION AUDIENCE AND GOALS IN THE ENGLISH AS LoLT COURSE

3.1 Introduction

The purpose of this chapter is to identify the audience and goals of this programme evaluation.

The first step in the evaluation process, namely the identification of the evaluation audience and goals according to stakeholder involvement in the context of the English as LoLT Course, is described in the first section of this chapter.

The first section is divided into two sub-sections. The first sub-section describes the identification of the multiple evaluation audience which moves from the general audience of the IDDP to the specific audience of the English as LoLT Course. The second introduces the clarification of the evaluation goals of the multiple evaluation audiences in the English as LoLT Course. A process of progressive focusing (cf. Chapter 1, Section 1.5) commences with the identification of a major evaluation goal from the variety of evaluation interests for each primary level stakeholder grouping.

The second section of this chapter provides an evaluation of the first step in Lynch's (1996:4) CAM to identify the evaluation audiences and goals of the English as LoLT Course. This section addresses the meta-evaluation purpose of the study, which is to evaluate the ability of the first step in the selected language programme model to effectively guide the selection of an evaluation audience and goals for this language programme.

The identification of the audience and goals follows in the next section.

3.2 Identification of the Evaluation Audiences and Goals

3.2.1 *Identification of Audience in the IDDP and English as LoLT Course Evaluation Context*

The distinction between a primary, secondary, and tertiary level of stakeholder involvement in the evaluation context has already been explained in the description of Lynch's (1996: 4) CAM in Chapter 2, Section 2.4.4.1. A description of the primary, secondary and tertiary level stakeholders in the IDDP and in the English as LoLT Course evaluation context follows.

3.2.1.1 Primary level stakeholders

Strategic Partners:

The Flemish Government and the Free State Department of Education

The primary evaluation audience in the Integrated District Development Project (IDDP) consisted of two strategic partners, the Flemish Government who was the funding agency, and the Free State Department of Education. The Director of the Curriculum Development and Support Directorate was the departmental and responsibility manager of the IDDP. Provincial officials from the Curriculum Development Sub-directorate monitored the development and implementation of the IDDP intervention programmes in general and of the English as LoLT Course in particular. The Thabo Mofutsanyana district officials monitored and supported the implementation of the intervention programmes at district level.

Project Implementation Agency:

Sacred Heart College Research and Development Unit

Sacred Heart College Research and Development Unit (SHC R&D) was contracted by the strategic partners as the IDDP implementing agency. The project manager and writer of this study was the Free State Programme Manager of SHC R&D. The project manager was responsible for the overall delivery of the IDDP intervention programmes and for the delivery of the English as LoLT Course as a specific intervention programme of the IDDP.

A SHC R&D implementation team was established to focus on the details of the design, implementation, and assessment of the English as LoLT Course. The implementation team was led by the SHC R&D Programme Manager of the Limpopo Province who had thirteen years' experience in language teaching in Grades 4 – 6 at Sacred Heart College. The team consisted of two material developers and one mentor. One material developer had eleven years' experience in teaching learners who used English as the language of learning and teaching at Intermediate Phase level at Sacred Heart College. The other material developer had four years' experience as a lecturer in Applied Linguistics at the University of the Witwatersrand. The mentor was a SeSotho-speaking lady who had four years' experience in facilitating curriculum development workshops in Outcomes-based education (OBE) and especially in the Languages Learning Area, for SHC R&D in the Limpopo and Free State provinces.

Course Participants:

The Teachers and District Officials Participating in the English as LoLT Course

The twelve teachers of the four project schools who participated in the English as LoLT Course became primary stakeholders in the evaluation context. Lynch (2003:16) defines the primary stakeholders of the evaluation context as those “responsible for the programme”. Teachers who participated in the language programme felt responsible for the effective implementation of the programme and therefore became primary stakeholders.

Moreover, their daily involvement as Grades 4 – 6 teachers in Mathematics, Natural Sciences, and English defined them as a constant and essential set of stakeholders. Their participation in the language programme co-determined the effectiveness of the language programme. In addition, two district officials from the Inclusive Education Section participated in the English as LoLT Course to provide a systemic support link between district and school level to the language intervention programme. The course consisted of a total number of fourteen participants: twelve teachers from the four IDDP schools and the two district officials from the Inclusive Education Section.

The North-West University:

School of Languages

Two professors from the School of Languages from the North-West University (Potchefstroom Campus) became stakeholders at the primary level of the evaluation audience. The IDDP project manager requested the professors to participate in the curriculum baseline and impact surveys and to quality assure the design and implementation of the English as LoLT Course. In addition, the School of Languages of the North-West University accredited the course.

Secondary Level Stakeholders:

Teachers in the Other Project Schools and Relevant District Officials

The twelve teachers from the four schools who participated in the English as LoLT Course shared information and experience with the Grade 4 – 6 Mathematics, Natural Sciences, and English teachers of the six IDDP project schools that did not participate in the course. Information sharing structures between schools called *Professional Working Groups*, were created by the project in consultation with the School Management and Governance Developers (SMGDs), the School Management Teams (SMTs) and the teachers of the ten IDDP schools. The Professional Working Groups formed complementary systemic support structures for

the professional development of teachers in the use of English as the language of learning and teaching.

The teachers of the ten project schools could meet on a monthly basis to share best practices in their learning areas and to discuss the development of Learning Programmes, Work Schedules and Lesson Plans, the implementation of effective learning and teaching techniques, and assessment strategies. The Professional Working Group meetings were attended by the Learning Facilitators (LFs) of the Mathematics and Natural Sciences Learning Areas.

In addition, the School Management Teams of the four schools that participated in the English as LoLT Course were responsible to monitor and support the twelve teachers.

The position of a learning facilitator for the Languages Learning Area was vacant during the first two years of the project. The two district officials from the Inclusive Education Section who participated in the English as LoLT Course, assumed the responsibility of sharing information and experiences with Learning Facilitators of the other learning areas during district meetings. They also assumed responsibility to bring the Learning Facilitator of the Languages Learning Area on board. The official was regularly updated when he was appointed during the third year of the project.

Tertiary level stakeholders:

National Curriculum Policy Developers, Intermediate Phase Teachers and Language Programme Evaluators

Curriculum policy developers of the National Department of Education, Intermediate Phase teachers in the Free State Department of Education and in other provinces, and language programme evaluators and researchers are tertiary level stakeholders. These stakeholders have little or no contact with the actual evaluation context, but are grappling with the effective implementation of English as the LoLT. Knowledge and insights derived from the findings and recommendations in the evaluation report could be applied to their own practices.

The above description of stakeholder involvement at primary, secondary and tertiary levels illustrates the presence of multiple audiences in the evaluation context of the English as LoLT Course. According to Lynch (2003:16), primary stakeholders need to be distinguished from secondary and tertiary level stakeholders to identify which audiences should legitimately have a voice in determining the evaluation goals of the

language programme evaluation. The variety of evaluation interests and goals expressed by the primary stakeholders in the evaluation context of the English as LoLT Course are explored in the following sub-section.

3.2.1.2 Interests and Goals of the English as LoLT Course Evaluation Audiences

The following discussion explains the progressive focusing process (cf. Section 3.1) followed in the application of the second part of the first step in Lynch's (1996:4) CAM - the identification of the evaluation audiences' goals. The identification of evaluation goals logically follows the identification of the multiple evaluation audience at primary stakeholder level. A strategy of progressive focusing is followed to delineate the evaluation goals for each set of primary stakeholders more clearly and to establish a major evaluation goal for each set of stakeholders.

The identification of evaluation goals is informed by Greene's (2000:984) categorisation of four major contemporary approaches to formal programme evaluation. A detailed discussion of the categorisation appears in Chapter 2, Section 2.3. The present discussion applies the categories of *Primary Values Promoted*, *Key Audiences* and *Typical Evaluation Questions* of each major programme evaluation approach to the primary stakeholders of the English as LoLT evaluation context.

In addition, the identification of evaluation goals distinguishes between formative and summative goals. This distinction is linked to the evaluation interests of the primary stakeholders in the English as LoLT Course. A brief description of formative and summative goals precedes their application to the identification of the primary stakeholders' goals.

Lynch (2003:10) uses the terms *goal* and *purpose* interchangeably in a discussion about language programme evaluation for formative and for summative purposes. According to Lynch (2003:10), formative evaluation occurs while the language programme is being implemented and developed. The purpose is then to recommend changes for programme improvement. Formative evaluation therefore focuses on programme processes and contains "numerous small-scale recommendations for change" (Lynch, 2003:10).

Summative evaluation occurs at the end of a language programme's cycle. The purpose is to make an ultimate judgement about whether the programme has met its objectives. The outcome of a summative evaluation is therefore typically a formal

report to be used in large-scale decisions about whether funding and implementation of the programme should be continued. Nunan (1993:193) and Rea-Dickins and Germaine (1992:8) agree with Lynch's (2003:10) interpretation of formative and summative evaluation purposes.

Lynch (2003:10) emphasises the fact that most language programme evaluations represent a combination of formative and summative purposes. This statement is also applicable to the particular combination of formative and summative evaluation purposes in the evaluation of the English as LoLT Course. The evaluation goals or purposes are derived from the variety of interests expressed by the multiple audiences of the English as LoLT Course evaluation context. A description and discussion of the primary level stakeholders' interests and goals in the evaluation context of the English as LoLT Course follows.

3.2.1.3 Evaluation Interests and Goals of the Two Strategic Partners

The Free State Department of Education and the Flemish Government are high level policy and decision makers. Both strategic partners wanted to know whether the development of the English as LoLT Course was a necessary and an appropriate intervention strategy. These stakeholders were also interested in whether the English as LoLT Course was an effective programme to develop Grades 4 – 6 teachers' knowledge, skills, values, and attitudes in using English as the language of learning and teaching.

The strategic partners were furthermore interested in whether the English as LoLT Course could be implemented in other districts of the Free State Department of Education for the benefit of all. The Flemish Government and the Free State Department of Education were ultimately accountable to the tax payers in Flanders, South Africa, and to the Free State in particular. The two strategic partners wanted to know on a quarterly basis whether the funds invested in the in-service training of teachers were spent judiciously.

The variety of interests expressed by the Free State Department of Education and by the Flemish Government as key evaluation audiences range from accountability, to efficient programme management, to the development of an effective INSET programme, to the transformation of the education system through the professional development of all teachers in the Free State Province. This wide range of interests includes the promotion of key primary values as described in Greene's (2000:984) categorisation from all four major approaches to formal programme evaluation.

The two strategic partners were especially interested in the evaluation findings for the purpose of accountability. The promotion of the key value of accountability by the strategic partners as high level policy and decision makers required the presentation of quality assured evidence in the format of quarterly progress reports and in the final report.

Progress in the conceptualisation, design, and implementation of the English as LoLT Course provided a formative purpose for the language programme evaluation. The evaluation purpose of the final report required a summative judgement about whether the English as LoLT Course would receive continued funding support from the Free State Department of Education. Lynch (2003:16) refers to the link of summative evaluation to the accountability issue: "the politicians and the taxpaying public they represent want to know whether or not the programme is working in order to assure themselves that money is being spent wisely." Accountability was, therefore, the primary value promoted by the strategic partners in the IDDP to effect transformation in education from a socio-economic and political perspective.

The explicit link between accountability and the summative evaluation goal of the final report drawn by Lynch (2003:16) seems to preclude the link between accountability and the formative evaluation goal of the quarterly progress reports. In the case of the IDDP the availability of funds was also linked to satisfactory progress in the development and implementation of the identified intervention programmes, such as the English as LoLT Course. The main goal of accountability was therefore linked to formative and summative evaluation purposes in the English as LoLT evaluation context.

3.2.1.4 Evaluation Interests and Goals of the SHC R&D Implementation Team

The SHC R&D implementation team was first and foremost interested in descriptive information about whether and how the programme had made a difference in the course participants' teaching practice. The language programme was designed and implemented to develop teachers' competency in facilitating learning in English as the LoLT at Grades 4 – 6 levels. Formative and summative evaluations were required for curriculum and teacher development purposes. Teachers' professional development and the effectiveness of the course were continuously assessed by the programme staff and by the teachers themselves. The SHC R&D implementation team was also interested in whether the course participants had internalised accountability for their own self-development during, and especially at the end of, the language programme.

A wide variety of primary values in Greene's (2000:984) descriptive categorisation was promoted by the SHC R&D implementation team in the interest of designing and developing an efficient and effective English as LoLT Course for and with teachers. Primary values ranging from efficiency, to practicality and effectiveness, to understanding and personal experience, to empowerment and social change are derived from postpositivism, utilitarian pragmatism, interpretivism and constructivism, and critical social sciences respectively.

However, curriculum development was a central interest and a main goal of the SHC R&D implementation team. The main goal of curriculum development required an emphasis on a detailed formative evaluation of the English as LoLT Course.

3.2.1.5 Evaluation Interests and Goals of the Project Manager

The writer as project manager was interested in the overall efficiency and effectiveness of the English as LoLT Course to realise the IDDP objective of transforming teachers' organisational development and performance capacity at the level of the classroom.

The key values of efficiency and cost-effectiveness, managerial effectiveness, understanding and contextualism, and social change informed by postpositivism, utilitarian pragmatism, interpretivism, and critical social sciences respectively, were consequently promoted by the writer in her role as project manager. In addition, the project manager's research interest in applied linguistics and in language programme evaluation led to the evaluation and meta-evaluation of the English as LoLT Course.

The project manager was ultimately responsible for managing the delivery of the English as LoLT Course as an intervention programme in the Integrated District Development Project (IDDP). This responsibility promoted the primary values of practicality, managerial effectiveness and utility underpinned by utilitarian pragmatism. Accountability remained the main goal of the project manager from a project management perspective. The evaluation goals of the project manager were formative and summative. The project manager was responsible for the submission of composite quarterly reports to the strategic partners based on formative evaluations of the effectiveness of the English as LoLT Course processes. The project manager was also responsible for the final evaluation reports based on a summative evaluation of the effectiveness of the English as LoLT Course.

3.2.1.6 Evaluation Interests and Goals of the Course Participants

The teachers who participated in the English as LoLT Course were interested in how they could benefit from the formative evaluation of the course to improve the quality of their teaching practice and to take responsibility for the quality of their own learning. Rea-Dickins and Germaine (1992:26) defines evaluation for the purpose of teacher self-development as the “formalizing and extension of a teacher’s knowledge about teaching and learning in the classroom.”

The range of key values promoted through teachers' interests in developing their own teaching practice and skills in English as the LoLT varied from accountability in postpositivism, to practicality in utilitarian pragmatism, to understanding and personal experience in interpretivism and to empowerment and social change in the critical social sciences. The formative evaluation goal of self-development was central to the interests of the teacher participants.

The two district officials who participated in the English as LoLT Course shared the evaluation interests and goals of the teacher participants. A monitoring and support dimension was added to the interests and goals expressed by the teachers. The teacher self-development goal would also serve the interests of teachers and officials as secondary level stakeholders in the Thabo Mofutsanyana District.

3.2.1.7 Evaluation interests and goals of the North-West University: School of Languages

A professor of the School of Languages at the North-West University monitored and supported the quality of curriculum input by the SHC R&D implementation team. In addition, the professor moderated the learner output of the Intermediate Phase teachers and the two district officials from the Inclusive Education Unit. The quality assurance done by the professor was related to the goal of accountability promoted as a key value of postpositivism.

Two professors of the School of Languages were also requested by the IDDP Project Manager as researcher to collaborate in conducting the curriculum baseline and impact surveys (cf. Mostert, Dreyer and Van der Walt, 2002; 2004). The evaluation findings of the curriculum surveys were used to account for programme efficiency and effectiveness to the strategic partners as key primary level stakeholders.

The professors' research interest in the development and implementation of effective and valid language programme evaluations promoted the primary values of efficiency, accountability and policy enlightenment in postpositivism; practicality and utility in utilitarian pragmatism; and pluralism, understanding, contextualism and personal experience in interpretivism and constructivism.

The monitoring role of the School of Languages to assure the quality of the English as LoLT Course as an accredited short course at the North-West University linked to academic credibility and accountability. The effectiveness of the short course was monitored during the programme identification, design, implementation and impact assessment phases. Both formative and summative evaluation goals were aligned to the key evaluation interest of accountability from the perspective of applied linguistics.

The inadequacy of one evaluation approach to address equally the variety of interests of different primary stakeholders in the evaluation audience is illustrated in the above discussion. The challenge faced by evaluators is, therefore, not only to negotiate "whose questions will be addressed and whose interests will be served by their work" (Greene:1994:531), but also to select an evaluation approach that would address as many interests as possible without compromising the validity of the evaluation findings.

This challenge became particularly relevant to the selection of an evaluation approach for the English as LoLT Course. The challenge did not lie in negotiating for consensus to solve the expression of conflicting interests. The interests of all stakeholders, though from different perspectives, were united in the formative and summative evaluation goals related to accountability, curriculum development, and teacher self-development. The challenge lay in the selection of an evaluation approach that would address this range of evaluation interests and goals.

The following section evaluates the effectiveness of identifying a variety of interests and goals for a multiple evaluation audience in order to select a valid evaluation design for the English as LoLT Course.

3.3 An Evaluation of the First Step in the Context Adaptive Model

The identification of audience and goals in the evaluation context of the English as LoLT Course introduces the application of the first step in the evaluation process of Lynch's (1996:4) CAM.

The ability of this first step to facilitate a valid identification of the evaluation audiences and goals is analysed according to core criteria identified for the evaluation of the CAM (cf. Chapter 2, Section 2.5.3.5). The analysis follows the core criteria of flexibility, appropriateness, clarity of description and clarity of logic. Reflexive comments on the effectiveness of Lynch's (1996:4) CAM to facilitate the first step of the English as LoLT Course evaluation follow the descriptive analysis.

3.3.1 Flexibility

The flexibility of the first step in the CAM lies in its ability to promote the identification of a diverse set of primary stakeholders with a rich variety of interests in the evaluation of the English as LoLT Course. The emphasis placed on the identification of multiple stakeholder interests in the language programme evaluation context promotes the key values of pluralism and contextualism in an interpretivist approach to programme evaluation (Greene, 2000:984).

In addition, the flexibility of Lynch's (1996:4) CAM increases the usefulness of the evaluation to a broader scope of stakeholders in identifying various evaluation interests and goals. The model consequently facilitates a language programme evaluation that meets the utility standard in its stakeholder identification (Stufflebeam, 1999). The adherence to flexibility in the first step of Lynch's (1996:4) CAM initiates the validation process in an interpretivist and a utilitarian pragmatist approach to this language programme evaluation.

3.3.2 Appropriateness

The descriptions of the evaluation interests and goals ensure that the evaluation provides evaluations that are relevant to the primary level stakeholders' interests. The identification of the multiple audiences' evaluation goals of accountability, curriculum and self-development focuses on the usefulness of the evaluation to the stakeholders to promote a better understanding of English as the LoLT.

The appropriateness of identifying multiple evaluation audiences in the English as LoLT Course promotes the qualitative validation criterion of usefulness. This emphasis also promotes the utilisation focused approach in utilitarian pragmatism (cf. Table 1) which corresponds with the meta-evaluation standard of utility (Stufflebeam, 2001).

3.3.3 *Clarity of Description*

Lynch (2003:15-16) clearly distinguishes among primary, secondary, and tertiary levels of stakeholder involvement in the evaluation context. Examples of the various levels of involvement in the evaluation setting further clarify the description. Lynch (2003:16) provides a clear motivation for the inclusion of the course participants at the primary stakeholder level to explain the adjustment of stakeholder level from secondary (Lynch, 1996:168) to primary level.

Lynch (2003:16) motivates his inclusion of teachers as primary stakeholders in the evaluation audience because they “feel responsible for the programme that they work within”. The teachers in the English as LoLT Course formed part of the primary evaluation audience because they actively participated in this teacher development programme. The twelve teachers who participated in the English as LoLT Course were therefore defined as an evaluation audience based on their “right to know” (Stufflebeam, 1999). This evaluation standard requires the disclosure of findings to evaluation audiences to meet the meta-evaluation standard of propriety. The twelve teachers also formed a cohort of “constant and essential stakeholders” (Lynch, 2003:16).

In addition, Lynch (2003:9-11) clearly describes the distinction between summative and formative evaluation purposes to assist the evaluator with the identification of evaluation goals or purposes. Different scenarios of formative and summative evaluations are provided. (Lynch, 2003:10-11) also provides the following key questions to facilitate the identification of evaluation audiences: “Who is requesting the evaluation? Who will be affected by the evaluation?” The following key questions facilitate the identification of evaluation goals: “Why is the evaluation being conducted? What information is being requested and why?” (Lynch, 2003:11).

The answers to the above questions effectively guided the identification of evaluation audience and goals in the English as LoLT Course. The questions also promoted the meta-evaluation standard of accuracy in recording the purposes for the evaluation (Stufflebeam, 1999).

3.3.4 *Clarity of Logic in the Identification of Audience and Goals*

Clarity of logic is required for the evaluation of the English as LoLT Course to be convincing. A clear line of logic needs to align the evaluation arguments with the variety of evaluation interests and goals of the multiple evaluation audiences in the English as LoLT evaluation context. The validity of the evaluation argument derives from the degree

to which the evaluation design of the English as LoLT Course is convincingly aligned to the diverse set of primary stakeholders' interests and goals.

The focus on the alignment of evaluation audiences and goals, context, preliminary themes and design (Lynch, 2003:20) promotes the presentation of multi-faceted evaluations in the language programme evaluation. This alignment promotes the diverse values of accountability, utility, practicality, understanding, contextualism and social change in the English as LoLT evaluation (cf. Greene, 2000:984). This promotion of respect for diversity in the evaluation audiences' values and cultural differences is linked to the meta-evaluation standard of propriety in programme evaluation (Stufflebeam, 1999).

3.3.5 *Reflexive Comments*

The first question to be considered is whether Lynch's (1996:4) CAM is flexible enough to facilitate a useful and participatory approach to the evaluation of the English as LoLT Course. Does the model demonstrate its flexibility by being open to include new stakeholders during the course of the evaluation? The model does not refer to the inclusion of new stakeholders in the language programme evaluation. To the contrary, Lynch (1996:16) values consistency in the participation of teachers as a cohort in language programme evaluations. The twelve teachers who participated in the English as LoLT Course were a constant and essential evaluation audience (cf. Section 3.2.1.1).

The second question concerns the clarity of Lynch's (1996) CAM in identifying the evaluation audiences. The model advocates a participatory approach to programme evaluation in the identification of multiple evaluation audiences with a variety of perspectives. The question arises whether the model clearly articulates how to accommodate the various perspectives among the identified stakeholders during the evaluation process.

This consideration is especially relevant to the ongoing evaluation process of the English as LoLT Course (cf. Chapter 1, Section 1.4). Nunan (1993:198) comments that "unless clearly articulated principles of procedure are laid out at the beginning of the evaluation, it is quite possible that these differences of perception may jeopardise the evaluation". Nunan (1993:198) then provides an example of a comprehensive set of principles to guide the evaluation of a curriculum innovation. According to Nunan (1993:198), the purpose of the principles is to provide a clear statement on the rights and responsibilities of the participants to the data, outcomes and recommendations of the evaluation.

In addition, the meta-evaluation standards for propriety in the checklist developed by Stufflebeam (1999:4) include standards for the articulation of formal agreements that need to be reached from the onset of the evaluation. Beretta (1992:20) refers to the clear articulation of procedural principles as a “coherent charter for the evaluation”. He highlights the importance of arriving at a formal agreement between the evaluator and the stakeholder through a period of negotiation.

Reflexive comments made by Alderson and Beretta (1992:58) on the evaluation of an ESP Project in Brazil emphasises the importance of pre-evaluation negotiation. They commented that the evaluation needs of the Overseas Development Administration (ODA) who commissioned the study could have been articulated much more clearly. According to Alderson and Beretta (1992:59), a fully negotiated evaluation charter could have determined the funders’ needs and their input in the design of the evaluation before the evaluation had started.

The writer as project manager and as evaluator negotiated formalised and budgeted implementation procedures of the English as LoLT Course evaluation before it started. However, these negotiations formed part of standardised project management procedures. The guidelines provided by Lynch (cf. 1996; 2003) did not influence the negotiation process for the evaluation of the English as LoLT Course.

The third point for reflexive comment is the consideration of whether the clear identification of multiple levels, interests and goals in the English as LoLT Course evaluation might not lead to confusion after all. The wealth of data accumulated in response to the evaluation questions from the multiple audiences might become too daunting for the evaluators and the evaluation audiences to interpret. Alderson and Beretta (1992:96) comment on the danger that “mountains of data will accumulate which evaluators will be unable to process” in their postscript on Lynch’s full account of the REST Project.

3.4 Conclusion

The primary, secondary and tertiary levels of stakeholders in English as LoLT Course were identified in this chapter. The identification of the stakeholders was done according to their involvement in the evaluation context of the English as LoLT Course. The main evaluation goals of the primary level of stakeholders in the evaluation context of the English as LoLT Course were defined through a process of progressive focusing.

The second section of this chapter offered an evaluation of the first step of Lynch's (1996:4) CAM applied to the English as LoLT Course evaluation. This analysis was done according to the core criteria of flexibility, appropriateness, clarity of description and clarity of logic.

However, the goals of the evaluation audiences needed to be further clarified through a process of progressive focusing on the evaluation context of the language intervention programme in the IDDP. The following chapter continues the process of progressive focusing. The application of the second and third steps of Lynch's (1996:4) CAM enables a closer exploration of the evaluation context of the English as LoLT Course.

CHAPTER 4

EVALUATION CONTEXT AND PRELIMINARY THEMES IN THE ENGLISH AS LoLT COURSE

4.1 Introduction

This chapter focuses on the identification of the English as LoLT Course evaluation context. The chapter describes and evaluates the application of the second and third steps in Lynch's (1996:4) CAM to the evaluation of the English as LoLT Course.

The first section of the present chapter offers a context inventory of the English as LoLT Course evaluation context (cf. Chapter 2, Section 2.4.4.2). The second section describes the identification of preliminary themes for the evaluation of the language programme (cf. Chapter 2, Section 2.4.4.3). The third section evaluates the guidance provided in the second and third steps of Lynch's (1996:4) CAM to effectively identify the evaluation context and themes of the English as LoLT Course.

4.2 A Context Inventory of the English as LoLT Course Evaluation Context

This section is divided into two sub-sections. The first sub-section presents the context inventory in the second step of the CAM offered by Lynch (2003:18-19). The second sub-section offers a context inventory of the English as LoLT Course. This inventory is based on the guiding questions presented in the CAM (Lynch, 2003:18-19).

4.2.1 A Description of the Context Inventory in the CAM

The context inventory in the second step of the CAM described by Lynch (2003:18) requires a listing of the following detail: the resources available for the evaluation, time requirements, features of the language programme, characteristics of the programme participants, theoretical and philosophical influences, and socio-political and cultural issues.

The comprehensive set of guiding questions in Lynch (2003:18-19) provide exemplary, though not exhaustive, questions to guide the development of a context inventory for the evaluation of the English as LoLT Course.

The set of guiding questions for language programme evaluation quoted from Lynch (2003:19) are presented below.

- Is there a group of learners that can serve as a comparison for the programme being evaluated?
- How were the learners selected for the programme (and for the comparison group, if one exists)?
- What are the professional backgrounds and experience of the programme staff?
- To what extent will the programme participants (administrators, students, teachers, others) be available for information-gathering (including administering evaluation procedures and participating in data-gathering such as interviews)?
- What understandings do the programme participants have of the evaluation goals?
- What are the attitudes of the programme participants towards evaluation in general, and the proposed evaluation in particular?
- Will there be particular types of evaluation expertise available (such as ethnographers, classroom discourse analysts, multivariate statistical analysts)?
- What is the size and scheduling of the programme and its classes?
- What are the instructional materials, including electronic media, available to the programme?
- Are there particular social, political or cultural issues that have motivated the evaluation?
- Are there particular social, political, or cultural issues – both within the programme and in the community surrounding it – that are likely to affect the interpretation of evaluation results?

4.2.2 A Context Inventory of the English as LoLT Course Evaluation

Context

The questions asked in the context inventory were considered to compile the English as LoLT context inventory. The clarification of the evaluation context forms part of the process of progressive focusing in the illuminative evaluation strategy followed in this study. Information already obtained on the audience and goals of the English as LoLT Course evaluation context, which is relevant to the present description, is consequently mentioned very briefly. The description is presented as answers to most of the questions asked in Lynch's (2003:19) context inventory. The answers follow the same order as the questions presented in Lynch's (2003:19) context inventory. The questions are repeated for the sake of clarity.

Is there a group of learners that can serve as a comparison for the programme being evaluated?

There was no comparison group in the evaluation of the English as LoLT Course. The evaluation was conducted in the specific education context of the Intermediate Phase classrooms in four IDDP schools, and it was conducted as a case study. A group of twelve teachers and two district officials participated in the study. A programme group-only design that formed part of the quasi-experimental design was therefore used for quantitative data collection and analysis procedures (Lynch, 2003:22-25) in the impact evaluation of the English as LoLT Course (cf. Chapter 5, Section 5.4.3.1).

How were the learners selected for the programme (and for the comparison group, if one exists)?

Participants in the four schools were selected according to the following criteria:

- Teachers preferably had to teach Intermediate Phase learners.
- Teachers preferably had to teach Mathematics, Science, or English as a first additional language.
- Teachers were not allowed to follow any INSET Courses at the same time as the English as LoLT Course.

Twelve of the Intermediate Phase Mathematics, Science and English teachers in the four IDDP schools who complied with the above selection criteria, volunteered to participate in the English as LoLT Course.

The two district officials who participated in the course were from the Inclusive Education Section (cf. Chapter 3, Section 3.2.1.1). They were responsible to monitor and support Intermediate and Senior Phase teachers in Languages, Mathematics and in Life Orientation. They had to be able to provide sustainable support to the teachers who participated in the course.

What are the professional backgrounds and experience of the programme staff?

Information about the Sacred Heart College Research and Development (SHC R&D) implementation team has already been provided (cf. Chapter 3, Section 3.2.1.1). A brief description of the background and experience of the SHC R&D implementation team follows.

The SHC R&D Team jointly had 20 years' experience in OBE teaching at primary school level. They had experience in teaching English as a first additional language and as the language of learning and teaching at Sacred Heart College, a private school in

Observatory, Johannesburg. In addition, the team jointly had 16 years' experience in teacher training, in course design, implementation, assessment and materials development. The team also jointly had 10 years' experience in language teaching at tertiary level.

To what extent will the programme participants (administrators, students, teachers, others) be available for information-gathering (including administering evaluation procedures and participating in data-gathering such as interviews)?

The twelve teachers were fully available for information-gathering. The Thabo Mofutsanyana District and the Free State Department of Education had officially signed a bi-lateral agreement with the Flemish Government for the implementation of the Integrated District Development Project (IDDP). This official agreement included the selection of ten primary schools for the IDDP and the subsequent identification of four of these schools for the development, implementation, monitoring and evaluation of the English as LoLT Course.

The School Management Teams (SMTs) of the four IDDP schools were officially aware that their teachers would participate in the language intervention programme. The SMTs granted permission that the twelve teachers could participate in the language programme and provided classrooms for training workshops. The SMTs also allowed the various evaluation teams (cf. Chapter 5, Section 5.2.2) to conduct needs assessment and impact surveys, and monitoring and support visits over a period of 26 months from August 2002 to October 2004.

Interactions with the participants were always negotiated to ensure that the programme delivery and evaluation would not interfere with their teaching contact time. The twelve teacher participants were available for different types of evaluation during English as LoLT Course workshops in the afternoons from 14:00-16:00, for classroom observations and interviews during the needs and impact assessment surveys and for two-hour examinations arranged with their School Management Teams. The complex reality of the education context in the four IDDP schools promoted the use of portfolio assignments as the most practical evaluation technique.

The district officials were fully available for participation in the programme, for monitoring and support activities, and for interviews. The provincial officials were also fully available for monitoring and support activities. The district and provincial officials participated in data-gathering procedures and in interviews.

What understandings do the programme participants have of the evaluation goals?

Information to answer this question has already been provided in the description of the programme participants' evaluation interests and goals as primary level stakeholders in Chapter 3, Section 3.2.1.6. The main goal of teacher self-development to formalise and extend teachers' knowledge about teaching and learning in the classroom was identified. In addition, the evaluation context of the English as LoLT Course required an evaluation of teachers' ability to be accountable for their own development. An evaluation of teachers' skills to use English meaningfully in the development of their outcomes based teaching practices was therefore required.

What are the attitudes of the programme participants towards evaluation in general, and the proposed evaluation in particular?

The application of this question to the evaluation context of the English as LoLT Course focused on the personal, social, and political level of interest of the programme participants. The SHC R&D implementation team shared the developmental purpose of the English as LoLT Course as a language intervention programme in the Integrated District Development Project (IDDP) with the programme participants. The developmental support provided by the district and provincial officials of the Free State Department of Education involved in the IDDP and in the English as LoLT Course provided evidence to the twelve teachers and their communities that the primary values of social change, empowerment and egalitarianism were promoted.

The teacher participants had a positive attitude towards the proposed evaluations because the IDDP project manager and the departmental officials highlighted the developmental purpose and the participatory nature of the language programme. The language programme evaluations corresponded with their own evaluation goals of teacher self-development and of curriculum development. However, the teachers' attitudes towards evaluation in general were still doubtful as some teachers perceived monitoring from district officials and their school management teams as judgmental rather than developmental.

Will there be particular types of evaluation expertise available (such as ethnographers, classroom discourse analysts, multivariate statistical analysts)?

The professors of the School of Language of the North West University had vast experience in applied linguistics. They had international and national experience in English as a second language (ESL) learning and teaching, as well as in research. Evaluation expertise in qualitative and quantitative evaluation research was therefore available.

What is the size and scheduling of the programme and its classes?

The programme size and scheduling of the English as LoLT Course was strongly influenced by the IDDP project delivery context and by the education context in the Intermediate Phase classrooms of the four IDDP schools. The overall duration of the course was scheduled for a period of 18 months. The implementation period of the English as LoLT Course was linked to the project delivery period of 18 implementation months following the first 9 months of project and programme negotiations, baselines and conceptualisations.

In addition, the scheduling of the English as LoLT Course and its workshops was influenced by the complex reality of the education context in the four IDDP schools. The activities in the school year plans required teachers' full participation.

The twelve teachers could only participate in the English as LoLT Course after school hours on afternoons when they were not involved in extra curricular activities. Teachers were not easily available during the first and the last two months of the year. They also received training on Outcomes-based education during most holidays, except during the December holidays.

Are there particular social, political or cultural issues that have motivated the evaluation?

The developmental goals of the programme evaluation corresponded with the social and political goal of providing quality education to all through equal access to learning and teaching. Equal access to quality education is improved through the effective use of the language of learning and teaching.

This transformational goal, as well as the goals of professional and curriculum development, largely contributed to the evaluation of the English as LoLT Course. All primary level stakeholders in the English as LoLT Course wanted to know, each from their own perspective, whether the language intervention programme was indeed effective (cf. Chapter 3, Section 3.2.1.3-7).

Are there particular social, political or cultural issues – both within the programme and in the community surrounding it – that are likely to affect the interpretation of evaluation results?

The parents or guardians of the learners in the four IDDP schools had chosen English as the language of learning and teaching. The underlying assumption of this choice was that learners would have increased opportunities in the world of work. The role and

status of English as an international language used for economic and legal transactions is well-known. Proficiency in English would assist learners to secure jobs. In turn, secured employment would assist the community in the redress of past imbalances through the eradication of poverty. The strong emphasis placed on self-development as an evaluation goal of the teachers and the district officials contributed to the promotion of empowerment and social change as primary values in the development of their skills to use English as the language of learning and teaching.

The validity of the English as LoLT Course evaluation could be compromised by an overly positive evaluation of programme participants influenced by a strong expectation of the programme to promote empowerment and social change. A valid evaluation of the language programme would therefore have to adhere to the validation criteria of rigour, completeness and coherence in its qualitative and quantitative data collection procedures and analyses.

The only question in the context inventory that was not applied to the evaluation context of the English as LoLT Course was the question about the availability of the instructional materials, including electronic media, to the programme. This question could not be applied in the second step of the CAM to the design process of the English as LoLT Short evaluation. The instructional material of the programme had not been designed at this stage of the evaluation process.

A more detailed needs assessment of learning and teaching in English in the Intermediate classrooms of the four IDDP schools was required. As previously mentioned (cf. Chapter 1, Section 1.4), Brown (2003:15) defines the language programme evaluation process for the purpose of curriculum development as “an ongoing needs assessment, one based on considerably more and clearer information”. This further process of progressive focusing would take place in the needs assessment phase of the English as LoLT Course as a case study (cf. Chapter 6).

The description of the third step in Lynch’s (1996:4) CAM as the identification of *preliminary* themes for the evaluation of the English as LoLT Course reinforces the emphasis on progressive focusing in illuminative evaluation research (cf. Chapter 1, Section 1.5). The following section provides a description of the third step in Lynch’s (1996:4) model applied to the English as LoLT Course evaluation context.

4.3 Preliminary Themes in the English as LoLT Course Evaluation Context

This section firstly presents an illustrative, but not exhaustive, list of preliminary themes offered in Lynch (2003:19). Secondly, the preliminary themes selected from those listed in Lynch (2003:19) are matched to the preliminary themes in the English as LoLT Course evaluation context.

The preliminary themes identified for the evaluation of the English as LoLT Course derive from the interests and goals of the primary level stakeholders and from the questions answered in the context inventory. The purpose of identifying preliminary themes is to focus progressively on the amount of information gathered about the interests and goals of the multiple evaluation audience in the English as LoLT Course.

4.3.1 Illustrative List of Preliminary Themes

The following illustrative list of preliminary themes is offered by Lynch (2003:19):

- conflicts between teaching philosophy/theory and learner expectations;
- support for programme from larger administrative units;
- the relationship between governmental agendas and assessment practices;
- personality and management style and conflicts;
- the match between teaching activities and assessment procedures;
- student motivation and attitudes towards teachers and programme;
- test anxiety;
- mixed levels of language proficiency;
- separate skills versus integrated skills teaching and assessment;
- the role and status of the language programme within a larger administrative unit;
- teacher autonomy and programme coherence;
- the role and status of teachers and students in curriculum decisions;
- social justice concerns;
- the role and status of the language in the community.

4.3.2 Match of Preliminary Themes

The preliminary themes listed by Lynch (2003:19) were considered in the identification of preliminary themes for the evaluation of the English as LoLT Course. A match between the illustrative list of preliminary themes in Lynch (2003: 19) and the preliminary themes identified from the English as LoLT Course evaluation context is presented in Table 2 below.

Table 2: Match of Selected Preliminary Evaluation Themes

PRELIMINARY EVALUATION THEMES	
<i>Selected from Lynch's Context Adaptive Model</i>	<i>Identified in the English as LoLT Course evaluation context</i>
Conflict between teaching philosophy/theory and learner expectations	Conflict between Outcomes-based education (OBE) policy and practice
Support for programme from larger administrative units.	Management support for the English as LoLT Course in the four IDDP schools, the Thabo Mofutsanyana District and the Free State Department of Education.
The relationship between governmental agendas and assessment practices	The relationship between policies on Outcomes-based education (OBE); the Revised National Curriculum Statement (RNCS); the Language in Education Policy (LiEP); the Assessment Policy and classroom practice.
Student motivation and attitudes towards teachers and programme	Programme participants' motivation and attitudes towards the Sacred Heart College Research and Development Unit (SHC R&D) and the English as LoLT Course.
Mixed levels of language proficiency	The use of English as the language learning and teaching
The role and status of the language programme within a larger administrative unit.	The role and status of English as the LoLT in the four Integrated District Development Project (IDDP) schools.
The role and status of teachers and students in curriculum decisions	The role and status of Intermediate Phase teachers in curriculum decisions
The role and status of the language in the community	The role and status of English in the Phuthaditjhaba community

The above match between the preliminary evaluation themes identified for the evaluation of the English as LoLT Course and the preliminary themes listed by Lynch (2003:19) is not exact. The writer as evaluator adapted the listed themes according to the interests and goals of the English as LoLT Course evaluation audiences (cf. Chapter 3; 3.2.1.3-7).

The evaluation themes explored: the tension between policies on Outcomes-based education (OBE) and classroom implementation; teacher and learner use of English as the language of learning and teaching; teacher and learner motivation and attitude towards learning and teaching; management support to learning and teaching; the role and status of English in the project schools; the role and status of Intermediate Phase teachers and learners in curriculum decisions; and the role and status of English in the Phuthaditjhaba community.

The preliminary evaluation themes structured the descriptive evaluations of the English as LoLT Course according to seven themes in the needs assessment phase (cf. Chapter

6, Section 6.3) and in the implementation phase (cf. Chapter 8, Sections 8.1, 2). The preliminary themes also informed the evaluation themes of the impact assessment phase, but they were combined to form clearer evaluation foci (cf. Chapter 10, Section 10.2).

However, the question to be considered in this chapter is whether the listing of preliminary themes and a context inventory are effective steps to determine an appropriate evaluation design for the English as LoLT Course. This question is considered in the evaluation of the second and third steps of the CAM presented in the following section.

4.4 An Evaluation of the Second and Third Steps in the Context Adaptive Model Applied to the English as LoLT Course

The application of the second and third steps to the evaluation context of the English as LoLT Course is evaluated as a phase, rather than as two separate steps. Lynch (2003:17-20) presents the compilation of a context inventory and the formulation of preliminary themes as part of a clarification phase in the design process of language programme evaluation. Lynch (2003:18) describes the purpose of this phase as guiding evaluators to “give some thought to how the context interacts with their goals and other potential audiences, and to articulate the important issues that exist in relation to these goals and audiences”.

The ability of the second and third steps in Lynch's (1996:4) CAM to facilitate a valid clarification of the English as LoLT Course evaluation context is analysed according to the core criteria of flexibility, appropriateness, clarity of description and clarity of logic (cf. Chapter 2, Section 2.5.3.5). Reflexive comments on the effectiveness of this language programme evaluation model to facilitate the clarification of the evaluation context in the English as LoLT Course follow the descriptive analysis.

4.4.1 Flexibility

Lynch (2003:18-20) offers an illustrative list of a context inventory and preliminary themes to guide the clarification of the English as LoLT Course evaluation context. Lynch (2003:18) highlights the fact that these lists are not prescriptive, but flexible, describing them as “exemplary, not exhaustive”.

In addition, the question format of the lists encourages the evaluator to keep an open mind in defining the interaction between the evaluation context and goals. The flexible

way in which Lynch (2003:18-19) presents the two lists of guiding questions to clarify the English as LoLT Course evaluation context increased its usefulness to the writer as evaluator.

Lynch's (1996:4) CAM has consequently facilitated the clarification of the English as LoLT Course evaluation context from a utilitarian pragmatist and from an interpretivist approach to programme evaluation. The validation of the English as LoLT Course evaluation from these two major programme evaluation approaches therefore continues. The model further meets the utility evaluation standard of providing information scope and selection to promote a better understanding of the client's most important evaluation requirements (cf. Stufflebeam, 1999).

4.4.2 Appropriateness

The clarification phase of the CAM has led to a clearer articulation of the evaluation interests and goals of the English as LoLT Programme participants (cf. Section 4.2.2). The attitudes of the programme participants towards evaluation in general and towards the English as LoLT Course in particular were also defined.

The positive developmental evaluation interest of the twelve teachers took prevalence over their generally negative attitude towards evaluation. As previously mentioned (cf. Section 4.2.2), the twelve teachers accepted the responsibility to participate in the evaluation of the English as LoLT Course. The question on the programme participants' attitudes towards evaluation (Lynch, 2003:18) focused teachers' evaluation interest on accountability as complementary to the major evaluation goal of teacher self-development. The two district officials also shared a positive attitude towards the programme evaluation. This positive attitude was based on an evaluation interest in developmental monitoring and support (cf. Chapter 3, Section 3.2.1.6).

The CAM has enabled a closer alignment of the evaluation context to the interests and goals of the English as LoLT Programme participants. The language programme model therefore promoted a fitness of purpose in the evaluation design process of the English Course. The exploratory lists of questions (Lynch, 2003:18-20) also promoted the feasibility standards of the evaluation in bringing the design process closer to the "real world settings" (Beretta, 1992:18). Information on the availability of the twelve teachers and the two district officials for the evaluation enabled, for example, the design of a realistic evaluation schedule. The evaluation consequently complied with the feasibility standard of having practical procedures (cf. Stufflebeam, 1999).

In addition, the clarification of the specific evaluation context in the English as LoLT Course case study adheres to the following interpretivist evaluation criteria: purposefulness; explicitness of assumptions and biases, and usefulness. The way in which the CAM promoted each of the mentioned criteria is analysed.

Purposefulness

A more detailed identification of the English as LoLT Course evaluation context and the formulation of preliminary themes further clarified the evaluation goals of the teacher and district official participants. A clearer understanding of their evaluation interests increased the purposefulness of the course evaluation. The risk that the methods used to collect and analyse the data drive the evaluation questions of the study was therefore reduced. Lynch's (1996:4) CAM continued to promote the feasibility meta-evaluation standard of practical procedures in tailoring methods and instruments to the information requirements of the English as LoLT Course evaluation audiences (Stufflebeam, 1999).

Explicitness of Assumptions and Biases

Emphasis is placed on the identification and formulation of assumptions and biases in the evaluation context of the English Course. The final question in the context inventory (cf. Section 4.2.1) on social, political or cultural issues led, for example, to explicit formulations of the communities' assumptions about the role of English to enable social development and transformation (cf. Section 4.2.2). The emphasis in the context inventory (cf. Section 4.2.1) on programme participants' attitudes toward the language programme evaluation also led to a clearer articulation of their assumptions and biases toward evaluation. This question promoted the meta-evaluation standard of propriety in facilitating a clearer understanding of how teachers and district officials valued evaluation (Stufflebeam, 1999).

Rigour

The question about the availability of evaluation expertise has promoted the inclusion of technical expertise in the evaluation of the English as LoLT Course. The writer as researcher and as programme evaluator included two professors from the School of Languages of the North-West University (Potchefstroom Campus) in the evaluation team (cf. Chapter 3, Section 3.2.1.1). This level of evaluation expertise promoted standards of accuracy that would contribute to the soundness of the evaluation through data collection and analysis methods that are precise, thorough, and "technically adequate" (cf. Beretta, 1992:18; Leedy & Ormrod, 2001:164-165). The question also facilitated the meta-evaluation standard of utility. It provided evaluator credibility through the inclusion of competent evaluators (Stufflebeam, 1999).

In addition, the question about the professional backgrounds and experience of the programme staff would increase the soundness of the evaluation. The SHC R&D implementation team (cf. Chapter 3, Section 3.2.1.1) formed an essential part of the evaluation process in the English as LoLT Course. Their collective experience in English language learning and teaching in the Intermediate Phase (cf. Section 4.2.2) contributed to the reliability of data collection and analysis procedures in the English as LoLT Course evaluation. This question further promoted the meta-evaluation standard of utility. It provided evaluator credibility through the engagement of evaluators who are appropriately responsive to issues of language and cultural differences (cf. Stufflebeam, 1999).

Usefulness

The evaluation interests and goals of the programme participants received focused attention in the evaluation context of the English as LoLT Course through the application of a clarification phase in Lynch's (2003:18-20) CAM. The model therefore increased the usefulness of this programme evaluation to respond to the developmental and transformational evaluation goals of the programme participants (cf. Chapter 3, Section 3.2.1.6).

4.4.3 Clarity of Description

The first two questions in the context inventory list about the availability of a comparison group and about the selection process of the programme participants promoted an emphasis on clarity of description in the evaluation design process of the English as LoLT Course.

The answer to the first question defined the evaluation design of programme participants in the English as LoLT Course as a programme-group only design (Lynch, 2003:24). This is a quasi-experimental design that forms part of positivist data collection and analysis procedures (Lynch, 2003:22-25). The answer to the second question further described the selection of the programme participants as non-randomised. The participants were selected according to clearly defined criteria (cf. Section 4.2.2). Twelve of the teachers, who complied with these criteria, chose to participate in the English as LoLT Course.

Lynch's (1996:4) CAM further promoted the adherence of the English as LoLT Course evaluation to the meta-evaluation standard of accuracy (Stufflebeam, 1999). The illustrative questions for the context inventory and for the preliminary evaluation themes

guided the writer as researcher and as evaluator to document the features of the English as LoLT Course evaluation context.

4.4.4 Clarity of Logic

Lynch (2003:20) explains the iterative nature of the CAM as follows. "As the assessment or evaluation is carried out, new information will become available concerning the context and important new themes will emerge. In this sense, the phases outlined in this chapter need to be viewed as iterative rather than linear".

The above explanation promotes the internal logic of the evaluation design process followed to provide convincing arguments in the English as LoLT Course evaluation. The strength of a convincing evaluation argument lies in the degree to which the evaluation context and themes are continuously aligned to the evaluation interests and goals of the multiple evaluation audience. The clarification phase in Lynch's (1996:4) CAM has initiated the interaction of context and themes in the English as LoLT Course evaluation as an ongoing process, regardless whether the line of argument was linear or iterative.

The identification of preliminary themes as the third step in the CAM starts emerging logically from the compilation of the context inventory (Lynch, 2003:19). The evaluation theme on programme participants' motivation and attitudes toward the English as LoLT Course started emerging, for example, from the question asked in the context inventory about the attitudes of the programme participants to the proposed evaluation.

The emphasis on clarity of logic in Lynch's (1996:4) CAM has started promoting a logical evaluation process in the English as LoLT Course. It complies with the meta-evaluation standard of accuracy. The evaluation process provides valid information through focusing the evaluation on key questions that logically link the conclusions to the data (cf. Beretta, 1992:18; Stufflebeam, 1999)

The above analysis indicates that the application of the clarification phase in Lynch's (1996:4) CAM to the evaluation context of the English as LoLT Course has facilitated a more detailed exploration of the evaluation context. This has increased the validity of the evaluation design process. It is aligned to a process of progressive focusing required in illuminative evaluation as the overall research strategy of the language programme evaluation.

4.4.5 Reflexive Comments

The first aspect for consideration is the flexibility of Lynch's (1996:4) CAM to facilitate continued negotiations with the stakeholders of the evaluation. The clarification phase forms an essential part of the important negotiation phase that precedes education and language programme evaluation (Beretta, 1992:20; Stufflebeam, 2001). Lynch (2003:17-18) emphasises the need for the evaluation team to explicitly catalogue the resources available for the evaluation and the time requirements.

However, explicit reference to consultations with the primary evaluation audiences or stakeholders on the availability of the resources required for the evaluation is lacking. The guiding questions are directed to the evaluation team only. The importance of negotiations with the stakeholders is further downscaled to cataloguing exercises instead of arriving at formal agreements.

The first five tasks in the programme meta-evaluation process described by Stufflebeam (2001) emphasise the importance of negotiations with the evaluation stakeholders. These negotiations culminate in the negotiation of a formal meta-evaluation contract. The checklist provided by Stufflebeam (1999) includes formal agreements and fiscal responsibility as meta-evaluation standards to assess the propriety of an education evaluation. Nunan (1993:200) highlights the importance of realistic timeframes and budgets for the successful completion of a language programme evaluation. He provides nine steps to guide a formal articulation of budgets and timeframes in an evaluation proposal to the stakeholders.

The flexibility of the cataloguing processes in Lynch's (1996:4) CAM, and consequently their usefulness, are jeopardised by an over-emphasis on the role of the evaluation team and an under emphasis on a negotiated, formal articulation of the evaluation context details. As previously mentioned (cf. Chapter 3, Section 3.3.5), the absence of an emphasis on negotiated, formalised documentation in the first three steps of Lynch's (1996:4) CAM did not jeopardise the effectiveness and efficiency of the English as LoLT Course evaluation. This language programme evaluation formed part of the formalised negotiations among all the stakeholders in the Integrated District Development Project (IDDP).

The second matter concerns the appropriateness of appointing outsider evaluation experts in programme evaluations. Lynch (2003:17) emphasises the inclusion of outsider experts to provide a fresh or more objective perspective of the evaluation context. The question in the context inventory focuses on the types of evaluation

expertise to be considered for an evaluation (cf. Section 4.2.1). Lynch (2003:19) views the outsider expert as a resource of technical expertise in language programme evaluations.

Alderson and Beretta (1992:96) comment in their postscript to Lynch's evaluation of the REST Project on an additional problem of accumulating mountains of data: evaluators will feel "ill-equipped to process" the data. Input from an outsider expert might be considered to cope adequately with the wealth of quantitative and qualitative data collected in following a mixed evaluation design. The inclusion of an outsider expert would therefore be appropriate to increase the usefulness and accuracy of the language programme evaluation. The writer as evaluator and as researcher included outsider experts in the evaluation of the English as LoLT Course to increase the technical soundness and consequently the accuracy and utility of the evaluation (cf. Chapter 3, Section 3.2.1.1).

However, the inclusion of outsider experts further impacts on the role of the evaluator in programme evaluation. Lynch (2003:20-21) links the role of the evaluator to the fourth step in his CAM (1996:4), which facilitates the selection of a research design for the language programme evaluation. The appropriateness of having an objective, participatory or a combination of these approaches to the evaluator's role in programme evaluation is therefore considered in the reflexive comments of Chapter 5 (cf. Section 5.5.5).

The third reflection considers the very first guiding question for the compilation of a context inventory. Lynch's (2003:19) question about the availability of a comparison group for the language programme evaluation is an indication of the importance attached to methodological concerns in his model. Alderson and Beretta (1992:96) comment that the REST Project evaluation illustrated the need to pay very careful attention to the practicality of plans for data gathering procedures "long before any programme can be evaluated".

However, the first question in the context inventory also led to a reflection on the limitations of the English as LoLT Course evaluation viewed from a positivist perspective. The programme-group only design in the set of quasi-experimental designs weakens the conclusions that can be reached about the programme effect or impact (Lynch, 2003:24). Ways of strengthening the conclusions of the programme impact evaluations therefore need to be considered from the onset of the evaluation.

Lynch (2003:28) suggests that a mixed evaluation design can “strengthen confidence in conclusions by providing evidence from one perspective that addresses contradictory or ambiguous evidence from the other perspective”. Lynch (2003:24) quotes his evaluation of the REST Project as an example of quantitative and qualitative data used to strengthen the validity of the findings. He comments that “the richness of evidence that accrues to a mixed design can be a useful validity check”.

4.5 Conclusion

Lynch (2003:20) includes the compilation of a context inventory (Step 2) and the identification of preliminary themes (Step 3) in his CAM as a clarification phase. This phase is introduced to further specify the multiple audiences and goals identified in the first step of the CAM in order to select the most appropriate evaluation design in its fourth step.

Considerations on the effectiveness of the clarification phase in the evaluation of the English as LoLT Course have indicated that a clarification phase is essential in programme evaluation. The clarification phase increases the validity of the evaluation design process by clarifying and strengthening the link between the evaluation interests and goals of the multiple evaluation audiences and the evaluation design of this language programme.

The clarity obtained in this chapter about the interests and goals of the multiple evaluation audiences in the English as LoLT Course evaluation context enables the selection of an appropriate evaluation design for the English as LoLT Course. The selection of this design is described and evaluated in the following chapter.

CHAPTER 5

AN EVALUATION DESIGN FOR THE ENGLISH AS LoLT COURSE

5.1 Introduction

The purpose of this chapter is to discuss the selection of an evaluation design for the English as LoLT Course. The selection flows logically from the identification of the audiences, goals, context, and preliminary themes. This process has been described in the previous two chapters of this study (cf. Chapters 3, 4). The present discussion describes the selection of a valid evaluation design for the English as LoLT Course as the fourth step of Lynch's (1996:4) model (cf. Chapter 2, Section 2.4.4.4). At a meta-evaluation level, the effectiveness of this step to facilitate the selection of a valid evaluation design for the English as LoLT Course is evaluated according to the meta-evaluation criteria selected in Chapter 2, Section 2.5.3.5.

According to Lynch (2003:20), the core question to be considered in the selection of an evaluation design is: "What type of evidence is required to make a convincing evaluation argument?" In order to answer this question, the writer, as evaluator, made some preliminary judgements about the selection of paradigms that would contribute to the validity of the English as LoLT Course evaluation evidence.

The first section of this chapter therefore discusses the influence of the writer's role as evaluator, project manager, and researcher in the choice of paradigms and an evaluation approach. The second section describes the selected evaluation design of the English as LoLT Course and its general design features. The third section traces the application of illuminative evaluation as an overall research strategy of the evaluation design in the needs assessment, implementation, and impact assessment phases of the case study. Illuminative evaluation was previously discussed as an overall strategy to structure the programme of study through the principle of progressive focusing (cf. Chapter 1, Sections 1.5). The fourth section assesses the effectiveness of Lynch's CAM (1996; 2003) to guide the selection of an appropriate evaluation design for the English as LoLT Course.

A discussion on the choice of paradigms in the selection of an evaluation design for the English as LoLT Course follows.

5.2 Paradigm Choices and the Selection of an Evaluation Design for the English as LoLT Course

5.2.1 *The Paradigm Dialogue*

The paradigm dialogue is a “major debate in education and psychology between advocates of positivistic, quantitative research methodology and advocates of naturalistic, qualitative research methodology” (Lynch, 1996:13). The relevance of the dialogue lies in explaining the assumptions that evaluators and evaluation audiences make when choosing one type of evidence over another. An understanding of how these assumptions influence the choice of an evaluation approach is therefore a key consideration in the selection of the English as LoLT Course evaluation design.

In order to understand the influence of underlying assumptions on the choice of an evaluation approach, key interpretations of the relevant assumptions need to be described. Lynch (2003:2-5) conceptualises an underlying assumption or paradigm as a lens through which the world is viewed and understood. Different lenses reflect different assumptions about how the world of language ability and language programmes can be researched and evaluated. Creswell (2003:6) refers to the assumptions about how researchers will learn and what they will learn during their research as *knowledge claims*. Greene (2000:984) uses the term *epistemology* to reflect the underlying assumptions of the evaluator and the evaluation audiences in their approaches to programme evaluation.

Lynch (2003:3) distinguishes two sets of assumptions about “the nature of reality or the relationship between the researcher and that reality”. One set of assumptions views reality as independent of the evaluators and their attempts to know it. The objective stance of the distanced observer leads to the selection of scientific, quantitatively-based evidence required to provide a convincing evaluation argument. Another set of assumptions views reality as dependent on the evaluators’ attempts to know it. This reality is socially constructed in and through their pursuit of knowledge. A subjective participation in the evaluation process leads to detailed descriptive evidence of a language programme to produce a convincing evaluation argument. This perspective is typical of the social sciences.

The two sets of assumptions are classified by Lynch (2003:3-4) as a two-category system. He labels the cluster of paradigms in applied linguistics based on physical sciences as *positivist* and the cluster of perspectives based on social sciences as

interpretivist. The positivist paradigm cluster includes postpositivism and the interpretivist paradigm cluster includes constructivism (Greene, 2000:984, Creswell, 2003:6-9).

However, Schwandt (2000:205) highlights the danger of labelling in his description of three epistemological stances for qualitative enquiry: "labeling is dangerous, for it blinds us to enduring issues, shared concerns, and points of tension that cut across the landscape of the movement, issues that each enquirer must come to terms with...". Howe (cited in Lynch, 1996:20) offers pragmatics as middle ground in the paradigm dialogue between the positivist and interpretive paradigms. Patton (1990:38) also advocates pragmatism as follows: "Rather than believing that one must choose to align with one paradigm or another, I advocate a paradigm of choices. A paradigm of choices rejects methodological orthodoxy in favour of methodological appropriateness as the primary criterion for judging methodological quality."

Creswell (2003:6) has identified pragmatism as a knowledge claim in research design. Creswell (2003:11) quotes the following writers on pragmatism: Rorty (1990), Murphy (1990), Cherryholmes (1992) and Patton (1990). He explains that "instead of methods being important, the problem is most important, and researchers use all approaches to understand the problem". Greene (2000:984) has categorised utilitarian pragmatism as an influential epistemology alongside postpositivism and interpretivism. A detailed discussion of the validation criteria for postpositivism, interpretivism and utilitarian pragmatism is presented in Chapter 2, Section 2.5.2.

The choice of a particular paradigm or a paradigm of choices to validate the selection of an approach and data collection design for language programme evaluation, ultimately rests with the evaluator and the evaluation audience. This judgement call results from another kind of dialogue, namely from the interaction between the evaluator and the evaluation audiences about their goals and interests in the language programme evaluation. Lynch (2003:20-21) highlights the important role of the evaluator in the selection of an evaluation design.

5.2.2 The Role of the Evaluator in the Selection of an Evaluation Design for the English as LoLT Course

The major role of the English as LoLT Course writer was to negotiate an evaluation paradigm that would ensure empirically justified judgments about the value of the language programme according to each primary stakeholder's vested interest. The writer also fulfilled her role as project manager of the Integrated District Development

Project (IDDP) as indicated in Chapter 3, Section 3.2.1.5. The English as LoLT Course took shape and was implemented as a development programme of the IDDP. The project management role of the evaluator had a decisive influence on the selection of an underlying assumption to validate the language programme evaluation design.

The writer as evaluator and project manager was interested in evaluating the utility and practicality of the English as LoLT Course as a curriculum development programme (cf. Chapter 3, Section 3.2.1.5). In addition, the writer as project manager wanted to explore the most effective ways of identifying and addressing problems that impeded the development of learning and teaching in the education context of the project. The evaluator chose pragmatism as an underlying assumption of the evaluation design.

Furthermore, the writer as evaluator and researcher was interested in identifying and addressing the Intermediate Phase learning and teaching problems in the four IDDP schools, particularly in the language of learning and teaching (cf. Chapter 3, Section 3.2.1.5). The writer as evaluator and as researcher was also concerned with solving the problems by finding out what worked in practice (cf. Chapter 1, Section 1.2). This evaluation research not only involved the writer as researcher, but consisted of evaluation teams that participated in the various assessment phases of the development programme. The pragmatic stance of the writer as evaluator in collaboration with the evaluation teams allowed for the selection of appropriate combinations of qualitative and quantitative research methods in their evaluations.

The writer as evaluator identified evaluation research teams that represented the major goals and interests of each primary stakeholder (cf. Chapter 3, Section 3.2.1.2).

Two evaluation research teams took part in the evaluation of the English as LoLT Course. The writer as evaluator conducted the IDDP curriculum baseline survey (cf. Mostert, Dreyer and Van der Walt, 2002) and the IDDP impact survey (cf. Mostert *et al.*, 2004) of teaching and learning programmes in the classroom context. These surveys were conducted in collaboration with the School of Languages of the North-West University (cf. Chapter 3, Section 3.2.1.7). Officials from the Free State Department of Education and the IDDP SHC R&D project consultants participated in the IDDP curriculum baseline and impact surveys.

The writer as evaluator and IDDP Project Manager collaborated with the English as LoLT Course SHC R&D implementation team to monitor and evaluate the effectiveness of the language programme design and implementation (cf. Appendix F). The teachers

and district officials who followed the language programme also participated in its monitoring from a reflective practice perspective (cf. Chapter 3, Section 3.2.1.6).

Over and above the writer as evaluator's role to lead the evaluations of the research teams, the evaluator was also interested in identifying, applying, and evaluating a language programme evaluation model for the evaluation of the English as LoLT Course (cf. Chapter 3, Section 3.2.1.5). The selection of a pragmatic stance allowed the researcher to determine the appropriateness of the language programme model for the evaluation of the English as LoLT Course.

The above discussion indicates the significant role played by the evaluator and the evaluation teams in the selection of a paradigm for the English as LoLT Course evaluation. In addition, the above explanation justified the selection of pragmatism as the paradigm of choice.

The selected approach to the evaluation of the English as LoLT Course is described below.

5.2.3 *Selected Approach to the Evaluation of the English as LoLT Course*

Lynch (2003:5) defines an approach as "a combination of paradigm and strategy for designing and carrying out the activities of assessment and evaluation". The paradigm for the evaluation of the English as LoLT Course was defined as pragmatism or, as Patton (1990:38) puts it: "a paradigm of choices". It follows logically that the selected evaluation research strategy should complement and strengthen the underlying assumptions of pragmatism. The writer as evaluator therefore selected illuminative evaluation (cf. Parlett & Hamilton, 1975) as an overall evaluation research strategy for the English as LoLT Course as a case study.

Illuminative evaluation allows for a combination of quantitative and qualitative data-gathering methods to offer the qualitative and quantitative data required for the evaluation of the English as LoLT Short Course. According to Parlett and Hamilton (1975:147), it is not a standard methodological package, but a general research strategy. The adaptable and eclectic nature of illuminative evaluation is described in the following way:

The choice of research tactics follows not from the research doctrine, but from decisions in each case as to the best available techniques: the problem defines the methods used, not vice versa. Equally, no method (with its own built-in limitations) is used exclusively or in isolation; different techniques are combined to throw light on a common problem.

(Parlett & Hamilton, 1975:147)

Problem solving is central to this pragmatic approach (cf. Chapter 1, Section 1.4). According to Creswell (2003:13), it provides the researcher the freedom to use a combination of approaches in order to solve a problem: "Instead of methods being important, the problem is most important, and researchers use all approaches to understand the problem".

Following Lynch's (2003:5) definition of an evaluation approach, the writer as evaluator therefore combined pragmatism and the illuminative evaluation strategy to form an evaluation approach to the English as LoLT Course. This pragmatic approach is similar to Creswell's (2003:13) Mixed Methods Approach which uses a mixed methods design in research. The selection of a mixed methods design for the evaluation of the English as LoLT Course is discussed in the next section.

5.3 Selection of an Evaluation Design for the English as LoLT Course

5.3.1 *A Mixed Evaluation Design*

The writer as evaluator selected a mixed methods research design for the overall evaluation of the English as LoLT Course. The mixed methods research design is informed by the Mixed Methods Approach (Creswell, 2003:18). This approach provides the language programme evaluation with the structure of quantitative research and the flexibility of qualitative enquiry. The design is therefore aligned with pragmatism which promotes a combination of paradigms, approaches and methods to evaluate the English as LoLT Course. The selection of a mixed methods research design provided the evaluator sufficient scope to choose, in consultation with the stakeholders of the primary evaluation audience, an appropriate combination of quantitative and qualitative designs, methods and techniques for a particular evaluation phase.

The mixed methods research design allows for sequential and concurrent data collection procedures. The writer as evaluator selected these data collection procedures for the evaluation process of the English as LoLT Course as a developmental programme in the Integrated District development Project (IDDP). The evaluation, which consisted of three phases, a needs assessment, programme implementation and impact assessment phase, stretched over a period of two and a half years.

Creswell (2003:16) explains that a researcher may use sequential procedures to "elaborate on or expand the findings of one method with another method". A study could, for example, begin with a quantitative method which tests concepts, to be followed by a

qualitative method which provides a detailed exploration of a few cases. This description of sequential procedures corresponds with Lynch's (2003:29) suggestion of a mixed evaluation design for a longitudinal study with "successive evaluation studies employing different designs". The programme evaluation process followed several evaluation stages in the evaluation phases (cf. Figure1). A schematic presentation of the English as LoLT Course evaluation that offers an example of a mixed evaluation design for a longitudinal study is presented at the end of Section 4 in this chapter (cf. Figure 3).

Creswell (2003:16) defines concurrent procedures as a procedure in which "the researcher converges quantitative and qualitative data in order to provide a comprehensive analysis of the research problem". Creswell (2003:16) continues to explain that the researcher collects both forms of data simultaneously in this mixed methods design and then integrates the information to interpret the overall results. According to Creswell (2003:16), this concurrent data collection procedure allows one set of data to be nested within another, larger data collection procedure. A concurrent data collection procedure was, for example, selected for the IDDP curriculum baseline survey (cf. Mostert *et al.*, 2002).

Creswell (2003:16) states unequivocally that he prefers a researcher to identify a single research paradigm for the overall research design. Lynch (2003:27) supports Creswell's (2003:16) preference for an overall research design from one paradigm with data collection and analysis procedures from both paradigms. According to Lynch (2003:27), "It is possible to have 'mixed strategies', where the design is primarily from one paradigm or the other, but to use data-gathering and analysis techniques from both." Patton (1990:191-195) provides six examples of mixed evaluation strategies with various mixes of measurement, design and analysis. Lynch (2003:27) distinguishes between mixed strategies that use quantitative and qualitative methods within one paradigm and mixed designs which combine different paradigms.

Lynch (2003:28) offers the example of his Reading English for Science and Technology (REST) evaluation to illustrate the advantages of a mixed evaluation design (cf. Master, 2005:109 -110). A mixed evaluation design provides a richer set of data on which evaluation judgements and informed decisions can be made. The evaluation audiences' confidence in the findings is strengthened by a mixed evaluation design. Evidence from a positivist perspective can, for example, be used to explain contradictory or ambiguous data from an interpretivist perspective.

5.3.2 *Illuminative Evaluation: an Overall Strategy of the Case Study and a Mixed Evaluation Design in the Impact Assessment Phase*

Lynch uses the term *strategy* as part of an approach, as well as for “different combinations of data and analysis within each design” (Lynch, 1996:157). This study has followed suit by applying illuminative evaluation as an overall strategy for the evaluation of the English as LoLT Course, and as a mixed evaluation design in its impact assessment study.

The writer as evaluator firstly selected Illuminative evaluation as the overall strategy for the evaluation of the English as LoLT Course as a case study (cf. Section 5.2.3). An exploration of the learning and teaching programme and milieu is central to the illuminative evaluation strategy. This study explored the interrelatedness between the twelve Intermediate Phase teachers’ application of OBE and English as LoLT teaching practices and their learning and teaching milieu.

The writer as evaluator then selected illuminative evaluation as a mixed evaluation design for quantitative and qualitative data collection and analysis in the impact assessment phase of the English as LoLT Course. Lynch (2003:25) refers to the illumination model as an interpretivist evaluation design due to the minor role assigned to quantitative data gathering and analysis techniques. However, he admits that because the illumination model allows for the use of quantitative and qualitative data collection and analysis procedures, it could be “better thought of as a mixed strategy” Lynch (1996:84).

The following sub-section describes the interaction between the overall mixed evaluation design of the English as LoLT Course and the case study as a qualitative evaluation research method.

5.3.3 *The English as LoLT Course as a Case Study*

According to Patton (1990:100), evaluation case studies show how qualitative and quantitative data can be combined and “how a team can combine secondary data, direct fieldwork, project documents, interviews and observations to draw policy-relevant conclusions from individual project case studies”. He then indicates the popularity of evaluation case studies. The US Aid Evaluation Special Study series had, for example, published over 60 project impact evaluation case studies by 1989.

Stake (2005:443) emphasises the overall importance of the case in a case study: “By whatever methods, we choose to study the case “. He argues that a majority of researchers doing casework call their studies by some other name because the label contributes little to the understanding of what they do. It is interesting to note that Lynch (cf. 1996; 2003) does not explicitly refer to his evaluations as case studies. Lynch (2003:28) refers to his evaluation of the REST programme as an example of language programme evaluation. Stake (2005:443), however, highlights the importance of labelling the case study for what can be learned about the single case.

De Vos (2002:364) identifies programme evaluation as a research type where a combination of qualitative and quantitative methods is imperative, yet highly problematic. The absence of guidelines on the practical combination of qualitative and quantitative evaluation methods is noted by De Vos (2002:364). Lynch (2003:28) confirms the complexity of mixed evaluation research designs.

The evaluation of the English as LoLT Course presents an exploration of a mixed evaluation design in a single case. In addition, particular features of the English as LoLT Course evaluation may simultaneously inform common language programme evaluation challenges. One of the major challenges is to select appropriate combinations of qualitative and quantitative data which increase the validity of the evaluation argument from more than one perspective.

Lynch (2003:28) highlights the possibility that mixed evaluation designs can result in contradictory findings that “will require reconciling different approaches to validity”. On the other hand, mixed evaluation designs can increase the validity of an evaluation argument through triangulation, which provides cross-data validity checks (Patton, 1990:188). In addition, a mixed design can offer multiple perspectives on the language programme and its setting.

According to De Vos (2002:364), studies that employ combined methods can be expensive, time-consuming, and lengthy. Documented examples of such studies therefore “tend to be funded projects with multiple investigators collecting data over an extended period of time”. (De Vos, 2002:364). The English as LoLT Course is a case in point.

The above discussion points out some challenges of combining quantitative and qualitative methods in mixed evaluation research designs (cf. Chapter 10, Section 10.5.5). The illuminative evaluation research strategy applied to the case study of the

English as LoLT Course offers an exploration of a mixed evaluation design from a pragmatic stance. A description of this application is provided in the following section of this chapter. A detailed description of the illumination model used as a mixed evaluation design for the impact assessment phase of this language programme evaluation follows in Chapter 9, Section 9.2.2 of this study.

5.4 Illuminative Evaluation Research Strategy Applied to the Overall Evaluation of the English as LoLT Short Course Case Study

Patton (1990:36) describes the role of an evaluation research strategy as follows: "A strategy provides basic direction. It permits seemingly isolated tasks and activities to fit together; it moves separate efforts toward a common, interrelated purpose. An evaluation research strategy, then, provides basic direction for the study."

A major role of the illuminative evaluation strategy in the evaluation of the English as LoLT Short Course was to integrate the three assessment phases of the case study into an overall language programme evaluation. The strategic role of illuminative evaluation (Parlett & Hamilton, 1975:147) moved the evaluation process from general to specific observations in the needs assessment phase; to a specific enquiry into the programme response to these needs in the implementation phase; followed by a discernment and description of the language programme's most significant features and processes in the impact assessment phase (cf. Figures 1, 3).

5.4.1 Phase One: Needs Assessment

The first phase of the case study was a needs assessment phase. A process of progressive focusing followed in the first evaluation stage moved from a definition of the broader education context of the study (cf. Figure 3, Stage 1a) to a specific needs analysis of the Intermediate Phase in the LoLT curriculum delivery context (cf. Figure 3, Stage 1b).

Parlett and Hamilton (1975:148) describe the process of progressive focusing in illuminative evaluation as follows: "Beginning with an extensive data base, the researchers systematically reduce the breadth of their enquiry to give more concentrated attention to the emerging issues." The advantage of progressive focusing, according to Parlett and Hamilton (1975:148), is that the problem of data overload is reduced and the accumulation of a mass of unanalysed material is prevented.

Progressive focusing in the needs assessment phase moved from a content analysis of existing project documentation on the education context in four of the ten IDDP schools to a specific curriculum baseline survey of twenty six Intermediate Phase teachers' learning and teaching needs in these four IDDP schools. The IDDP Curriculum baseline survey followed a mixed evaluation design which allowed the writer as researcher to assemble an information profile compiled from the concurrent and sequential collection of quantitative and qualitative data (cf. Creswell, 2003:16). The data were collected from documentary sources, observations and interviews. The writer as evaluator then interpreted the data according to the seven evaluation themes identified during the application of the third step in Lynch's (1996:4) CAM (cf. Chapter 4, Section 4.3.2).

As mentioned earlier (Chapter 4, Section 4.3.2), the needs assessment phase of the case study presented teachers' needs according to the following seven evaluation themes: the tension between Outcomes Based Education policy and classroom practice; English language learning and teaching; teacher and learner motivation and attitude toward learning and teaching; management support to the implementation of English as the LoLT; the role and status of English in the project schools; the role and status of the Intermediate Phase teachers in curriculum decisions; and the role and status of English in the Phuthaditshjaba community.

A brief description of the two sequential evaluations (Stages 1a,b) in the needs assessment phase of the English as LoLT Course follows (cf. Figures 1, 3).

5.4.1.1 Programme Evaluation Stage 1a: Content Analysis of Existing Data Sources

The initial assessment of the IDDP context was conducted in a baseline survey of the education context in a sample of four schools representative of the ten Integrated District Development Project (IDDP) schools. This quantitative survey was conducted by the Research Institute for Education Planning (RIEP) of the School of Education at the University of the Free State.

The questionnaire data, findings, and recommendations in the IDDP Contextual Baseline Survey Report (cf. Strauss, 2002) provided existing information on the Intermediate Phase education context in the four IDDP schools. According to De Vos (2002:377), "data generated by other researchers or surveys can be re-examined for their relevance to the new programme". An analysis of the data in this case study led to the identification of the English as LoLT intervention programme (cf. Chapter 6, Section 6.2.5).

In addition, the data, findings and recommendations of the two provincial systemic evaluation baseline surveys (cf. DoE, 2003b; FS DoE, 2005) provided existing information on the interrelatedness of teachers' needs in the education context of the four IDDP schools and in the broader context of the Free State Department of Education (FS DoE) as part of the South African education system (cf. Chapter 6, Section 6.2.5).

5.4.1.2 Programme Evaluation Stage 1b: Needs Analysis of Intermediate Phase Teachers using English as LoLT

The needs of the Intermediate Phase teachers in using English as the LoLT had to be established. A curriculum baseline survey was conducted in the same sample of four IDDP schools (cf. Section 5.4.1.1) in August 2002. The writer conducted this survey in collaboration with the School of Languages of the North-West University (cf. Section 2.2). Twenty six Intermediate Phase teachers who taught Mathematics, Science and English as the first additional language were observed and interviewed.

The qualitative and quantitative analysis of the survey yielded focused findings and recommendations presented in the IDDP Curriculum Baseline Survey Report (cf. Mostert *et al.*, 2002). The conceptualisation and design of the English as LoLT Short Course was therefore informed by a specific enquiry about the effective use of English as the LoLT in the four IDDP sample schools. A detailed description of the curriculum baseline survey using a mixed evaluation design is presented in Chapter 6, Section 6.2.6.2 of this case study.

5.4.2 Phase Two: Assessment of the Programme Implementation Phase

The second phase in the evaluation of the English as LoLT Short Course assessed the design and implementation of the language intervention programme. This phase included three evaluation stages, namely the verification of the language programme design, scope and level (Stages 2a,b); the monitoring of the language programme implementation process (Stage 3) and the evaluation of the language programme response (Stage 4) to the Intermediate Phase teaching practice needs identified in Stage 1b (cf. Figure 3).

The verification stage firstly evaluated the alignment of the language programme design (Stage 2a) to the Intermediate Phase teachers' needs identified in the curriculum baseline survey (Stage 1b). The second evaluation verified the appropriateness of the

English as LoLT Course scope and level (Stage 2b). The two assessments in the verification stage (Stages 2a,b) were conducted as evaluability assessments (De Vos, 2001:380).

5.4.2.1 Programme Evaluation Stages 2a,b: Evaluability Assessments

According to Rossi and Freeman (cited in De Vos, 2001:380) evaluability assessments consist of successive rounds of qualitative data collection with programme staff. These assessments are used to broaden evaluators' knowledge, verify information, and test "alternative programme options". This evaluability assessment therefore used an interpretivist research design.

The qualitative activities of the evaluability assessments in the implementation assessment phase of the English as LoLT Course evaluation correspond with the illuminative evaluation emphasis on building up a "continuous record of ongoing events, transactions, and informal remarks" (Parlett & Hamilton, 1975:148).

Records of observed meetings and discussions held by the writer as project manager and as researcher with the manager of the SHC R&D implementation team and with the research team of the School of Languages at the North-West University provide evidence of the first qualitative evaluability assessment (Stage 2a) (cf. Appendix B). The purpose of this evaluation stage was to verify the alignment of the language programme design with the twenty-six Intermediate Phase teachers' needs identified during the curriculum baseline survey (cf. Stage 1b).

A report of an introductory workshop held with sixteen of the twenty six Intermediate Phase teachers provide evidence of the second evaluability assessment of the English as LoLT Course (Stage 2b) (cf. Appendix C). Twelve of the sixteen teachers who attended this workshop volunteered to participate in the language programme. These twelve teachers eventually participated in the English as LoLT Course (cf. Chapter 7, Section 7.3.2.2). They formed a student cohort whose achievements were tracked over successive instructional periods of the programme in the case study (Lynch, 2003:25) (cf. Appendix I). The purpose of this evaluation stage was to verify the appropriateness of the language programme scope and level. Detailed descriptions of these evaluability assessments are offered in Chapter 7, Section 7.3. of this study.

5.4.2.2 Programme Evaluation Stage 3: Monitoring of the Language Programme Implementation Process

The third evaluation stage monitored the implementation process of the English as LoLT Course (cf. Figure 3). A mixed evaluation design enabled the collection and analysis of qualitative and quantitative data (cf. Section 5.3.1).

The writer as researcher and project manager monitored the progress of the twelve Intermediate Phase teachers of the four IDDP schools and the two district officials from the Inclusive Education Section in the English as LoLT Course. The SHC R&D implementation team recorded the language programme monitoring process in the IDDP Quarterly Reports (cf. Appendix F). These reports were submitted over a period of 18 months. The writer as IDDP project manager also considered regular inputs by the course moderator, the SHC R&D implementation team, the IDDP project coordinator in Phuthsditjhaba, a provincial curriculum developer and the Flemish representative for education (cf. Appendix G).

The English as LoLT Course moderator and the SHC R&D implementation team examined programme participants' scores for assignments and examinations (cf. Appendix I) as evidence in order to quantitatively substantiate the descriptive evaluation of their progress. Detailed descriptions of programme monitoring in Chapter 7, Section 7.4 of this study provide evidence of sustained and intensive enquiry into the implementation of the English as LoLT Course.

5.4.2.3 Programme Evaluation Stage 4: Assessment of the English as LoLT Course Response to the Intermediate Phase Teachers' Needs

The fourth evaluation stage of the English as LoLT Course (cf. Figure 3) assessed the response of this language intervention programme to the Intermediate Phase teachers' OBE curriculum needs in general, and to their usage of English as the LoLT in particular (cf. Chapter 6, Section 6.3.8).

The evaluation followed the seven evaluation themes of the needs assessment phase (cf. Table 3). The evaluation followed a mixed evaluation design. It assessed whether, and how, the English as LoLT Course had responded to the teachers' identified needs (cf. Chapter 6, Section 6.3.8).

The qualitative evaluation described how the English as LoLT Course responded to the Intermediate Phase teachers' identified needs (cf. Chapter 8, Section 8.2). The evaluation considered relevant literature to determine whether the language

programme was based on sound language teaching principles informed by current second language learning and teaching research. In addition, the evaluation considered whether the course had offered practical examples of OBE principles and policy applied at the appropriate level of the programme participants.

5.4.3 Phase Three: Impact Assessment

The third phase in the evaluation of the English as LoLT Course is the impact assessment phase of the case study (cf. Figure 3). The strategic role of illuminative evaluation in the third phase emphasises the identification of underlying principles and patterns of cause and effect in the programme, as well as placing the findings within a broader explanatory context (Parlett & Hamilton, 1975:148). According to Rossi and Freeman (cited in De Vos, 2001:383), the impact assessment phase “gauges the extent to which a programme causes change in the desired direction”. An impact assessment of the English as LoLT Course therefore asked whether the language programme had brought about any significant changes in the twelve Intermediate Phase teaching practices in general and in their use of English as the LoLT in particular.

The illumination model (cf. Section 5.3.2) was used to describe and explain the evaluation of these changes (cf. Parlett & Hamilton, 1975:148). This model provided a mixed evaluation design for the impact assessment phase. The writer as researcher used interviewing, questionnaires, observation and documentary analysis to collect quantitative and qualitative data during the impact assessment phase.

5.4.3.1 Programme Evaluation Stage 5: Evaluating the Programme Impact

The language programme impact (Stage 5) (cf. Figure 3) on the twelve Intermediate Phase teachers of the four IDDP schools was described and measured in this phase. In addition, the impact of the language programme on the two district officials from the Inclusive Education Section was assessed.

According to Parlett and Hamilton (1975:149), the discovery of participants’ views is “crucial to assessing the impact of an innovation”. The small-group interviews held with the programme participants provided qualitative data on their perceptions of the programme impact. Questionnaires completed immediately after the interviews provided additional quantitative and qualitative data (Lynch, 2003:130). The writer as researcher observed and evaluated videotaped lessons as part of the programme participants’ final examination. The findings of the observation schedules, interviews and documentary analysis from the curriculum impact survey also provided a set of

quantitative and qualitative data to describe and measure the effectiveness of the language programme.

The curriculum impact survey used the programme group-only design (Lynch, 2003:24-25) to measure the effect of the English as LoLT Course on the group of twelve Intermediate Phase teachers who participated in the programme (cf. Chapter 9, Section 9.3.4; Chapter 10, Sections 10.2, 5.1).

The sets of quantitative and qualitative data collected and analysed from interviews, questionnaires, observations, and examination statistics contributed to a composite data profile of the English as LoLT Course impact required in illuminative evaluation research. The writer as evaluator presented a descriptive evaluation of this rich database on the language programme impact according to three core evaluation themes. These themes had emerged from a continuous process of progressive focusing in the review of the data to identify the underlying organisational principles and interaction patterns of the language programme (Parlett & Hamilton, 1975:148) (cf. Chapter 9, Section 9.2.1).

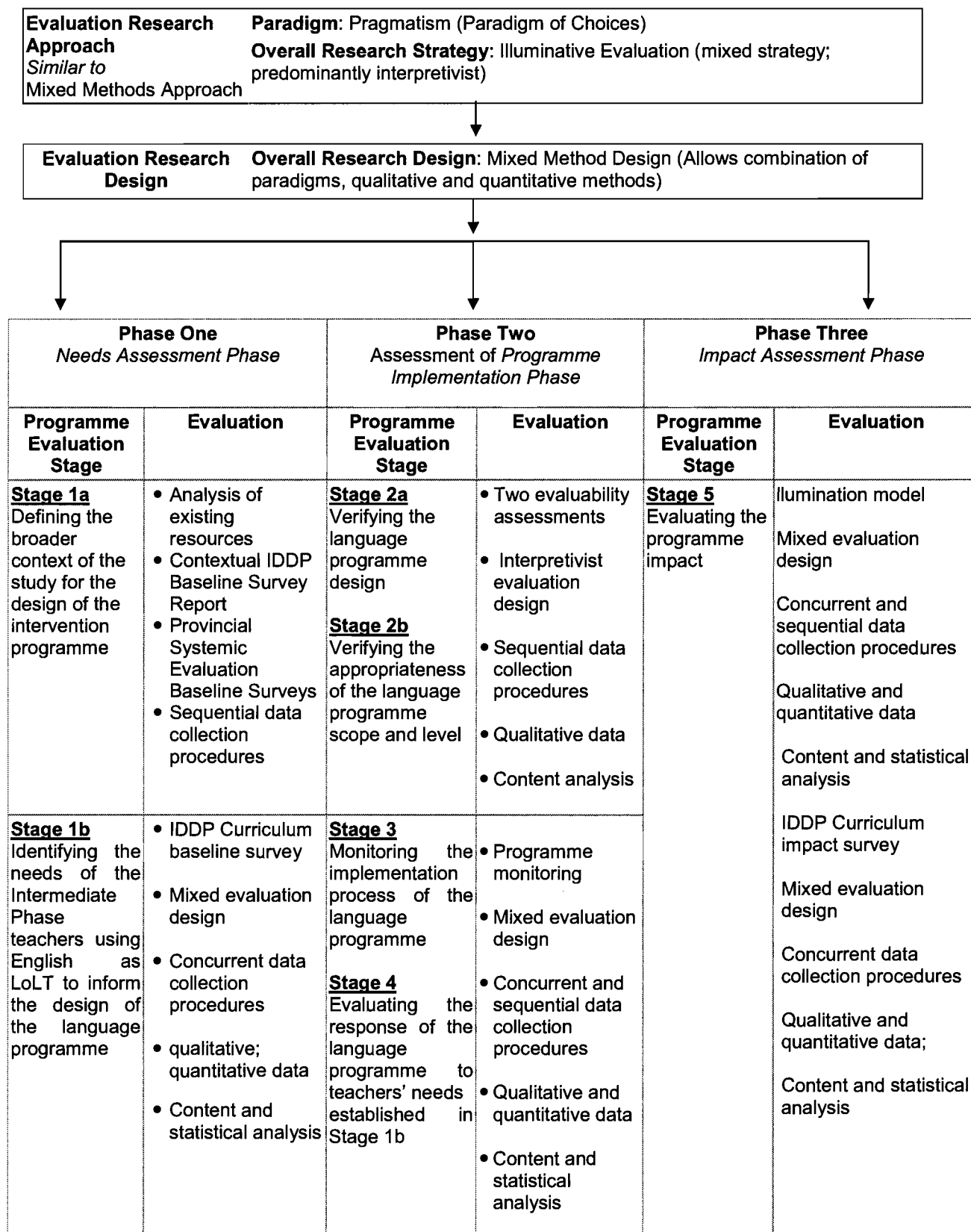
The seven evaluation themes of the needs assessment and implementation phases in the English as LoLT case study (cf. Table 3) were clustered to inform the teaching practice and learning milieu evaluation themes (cf. Chapter 10, Section 10.2). The impact assessment theme explored the most effective changes in the teaching practices of the twelve Intermediate Phase teachers in the four IDDP schools in relation to their learning milieu. The exploration described the multiple perspectives of the evaluation audience (cf. Chapter 10, Section 10.2.1).

A detailed description and evaluation of the English as LoLT Course impact assessment phase is provided in Chapters 9 and 10 of this study.

5.4.4 Schematic Presentation

The selection of an evaluation approach and design for the English as LoLT Course as described in the first three sections of this chapter is presented schematically in Figure 3.

Figure 3: Schematic Presentation of the Evaluation Research Approach, Design and Programme Evaluation Stages in the English as LoLT Course Case Study



5.5 An Evaluation of the Fourth Step in the Context Adaptive Model Applied to the English as LoLT Course

The ability of the fourth step in Lynch's (1996:4) CAM to guide the selection of a valid data collection design for the English as LoLT Course is analysed according to the core meta-evaluation criteria of flexibility, appropriateness, clarity of description and clarity of logic (cf. Chapter 2, Section 2.5.3.5). Reflexive comments on the effectiveness of this language programme evaluation model to facilitate the selection of a valid language programme evaluation design follow the descriptive analysis.

5.5.1 Flexibility

Lynch (2003:27-29) offers the evaluator the choice of a mixed evaluation design for data collection and emphasises that the validity of the evaluation would benefit from a richer set of data for evaluation judgements. In addition, a mixed evaluation design may offer the evaluator an opportunity to have a different perspective on the programme and its setting, "for however briefly" (Lynch, 2003: 28).

The flexibility of Lynch's (1996:4) CAM to facilitate data collection lies in its presentation of more than one evaluation research perspective and data collection design to choose from. The context adaptive model (CAM) further encourages flexibility in the selection of a data collection design that is adapted to the evaluation audiences and context of the programme evaluation (Lynch, 2003:22). The model consequently promotes the meta-evaluation standard of feasibility which requires the evaluation design to be practicable in real world settings (Beretta, 1992:18; Stufflebeam, 1999).

Lynch's (1996:39) final remarks on the historical overview of the paradigm dialogue argue for the flexibility of a pragmatic stance in language programme evaluation methods. The writer as researcher and evaluator adopted a pragmatic stance to the evaluation of the English as LoLT Course in collaboration with the evaluation teams. This stance included adopting utilitarian pragmatism (Greene, 2000:984) as a programme evaluation paradigm in addition to the adoption of pragmatism in the selection of evaluation methods. The criterion of usefulness in utilitarian pragmatism (cf. Table 1) validates the pragmatic stance adopted in the evaluation of the English as LoLT Course. The emphasis on usefulness in this selection also complies with the evaluation standard of utility (Beretta, 1992:18; Stufflebeam, 1999; 2001).

5.5.2 Appropriateness

The ultimate purpose of selecting an evaluation research approach and design for the English as LoLT Course is to provide a convincing argument to the primary stakeholders about its value. Examples of paradigms and evaluation designs and how these contribute to the validity of the evaluation argument are essential to enable the evaluator and the evaluation teams to make informed decisions in their selection of evaluation designs.

Lynch (2003:20-36; 1996:155-166) provides relevant descriptions of paradigms and of mixed evaluation designs. Lynch (1996:41-69) further offers detailed discussions on positivist and interpretivist approaches and threats to evaluation validity. Lynch (2003:20-36,148-165; 1996:12-69,155-166) consistently refers to relevant literature resources to provide more extensive and intensive information on the selection of evaluation approaches and designs.

These discussions and references have provided the evaluator with relevant information to ensure that the mixed method evaluation design (Creswell, 2003:18) is fit for its purpose. Lynch's (1996:4) CAM has consequently increased opportunities to provide a rigorous evaluation of the English as LoLT Course. The model has facilitated the potential of the evaluation to comply with the interpretivist programme evaluation standard of rigour: "The researcher uses rigorous, precise and thorough methods to collect, record, and analyse the data." (Leedy & Ormrod, 2001:164.)

The interpretivist programme evaluation standard of rigour further requires that the researcher "takes steps to remain as objective as possible throughout the project" (Leedy & Ormrod, 2001:164). Lynch (2003:20-1) highlights the fact that the stance of the evaluator influences the selection and validation of the language programme evaluation approach, research design and methods. The guidance provided by Lynch (2003:20-1) in this respect affects the fitness of purpose of the language programme evaluation to provide an appropriately rigorous evaluation. The reflexive comments (cf. Section 5.5.5) further examines the effectiveness of the CAM (Lynch, 2003:20-21) to provide guidance on the stance of the evaluator.

5.5.3 Clarity of Description

The clarity of the descriptions and examples of positivist and interpretivist paradigms (Lynch: 2003:3-5, 20-22; 1996:13-14) facilitated the selection of a valid approach for the evaluation of the English as LoLT Course. Lynch's (1996:12-39) historical overview of

the paradigm dialogue contributed to a clearer understanding and interpretation of the paradigm dialogue. As previously mentioned (cf. Section 5.5.2), Lynch offers detailed discussions on positivist and interpretivist approaches and threats to evaluation validity. Lynch (2003:20-36,148-165; 1996:12-69,155-166) also provides clear references to relevant literature resources on the selection of evaluation approaches and designs. The detail provided for this selection increased the potential of the English as LoLT Course to offer sound evaluations that are “technically adequate” (Beretta, 1992:18). These evaluations would respond to the meta-evaluation standard of accuracy (cf. Beretta, 1992:18; Stufflebeam, 1999) and to the interpretivist evaluation standard of rigour (cf. Leedy & Ormrod, 2001:164).

The descriptions and examples of evaluation designs applied to language programme evaluation (Lynch, 2003:22-36, 1996:71-91,155-166) also guided the practical application of mixed evaluation and interpretivist evaluation designs in the evaluation stages of the English as LoLT Course case study (cf. Figure 3). Lynch (2003:33-37) provides two vignettes as concise descriptions of typical evaluation design features to clarify the application of the designs to language programme evaluations.

In addition, Lynch (1996:160; 1992:94; 2003:28) has clearly illustrated the application of a mixed evaluation design to the evaluation of the Reading English for Science and Technology (REST) programme. According to Lynch (2003:28), this application strengthened confidence in conclusions reached “by providing evidence from one perspective that addresses contradictory or ambiguous evidence from the other perspective”. The emphasis on the increased weight of an evaluation argument based on findings from quantitative and qualitative data promotes the interpretivist evaluation standard of persuasiveness (Leedy & Ormrod, 2001:165) (cf. Chapter 2, Section 2.5.3.2).

5.5.4 *Clarity of Logic*

Lynch (2003:20) advises that the combination of information on the evaluation audience, goals, context and themes should determine the selection of an evaluation approach to inform the data collection design. Lynch’s (1996:4) CAM encouraged a logical link between the identification of the English as LoLT Course audiences and goals (Step 1); the clarification of the evaluation context and preliminary themes (Steps 2 and 3) and the selection of an overall and specific evaluation designs for data collection (Step 4) in this case study.

Lynch (2003:20-21) emphasises the importance of selecting an evaluation approach and stance before choosing an evaluation design. This emphasis heightened the validity of Creswell's (2003:18) mixed method evaluation design selected as the overall research design for the evaluation of the English as LoLT Course (cf. Figure 3). The epistemology of utilitarian pragmatism (Greene, 2000:984) validated the pragmatic stance of the evaluator and evaluation teams in the English as LoLT Course, as well as the selection of a mixed method evaluation design. The validation of the evaluation design increased the ability of the English as LoLT Course evaluation to respond to the meta-evaluation standard of accuracy (Beretta, 1992; Stufflebeam, 1999).

5.5.5 Reflexive Comments

The first reflexive comment concerns the flexibility of Lynch's (1996:4) CAM in facilitating the selection of an underlying paradigm to validate the English as LoLT Course evaluation design. Despite Lynch's (1996:3) claim that his context adaptive model is meant to be a flexible heuristic, he promotes an evaluator's allegiance to either a positivistic or to an interpretivist paradigm. Lynch (2003:20) advises the evaluator to decline participation in a project if the evaluator's approach, for example interpretivist, differs from the mostly positivist demands of the primary audience. This advice links with Lynch's classification of paradigms as a two-category system of positivist and interpretivist assumptions which do not seem to allow the evaluator with the middle ground option of pragmatism as an alternative paradigm of choices (cf. Section 5.2.1).

Lynch (2003:27) cautions the evaluator that a combination of positivist and interpretivist perspectives in mixed evaluation designs "run the risk of compromising one paradigm or the other". Lynch (2003:28) indicates the daunting task of mixing paradigms which may initially be incompatible with the evaluator's research philosophy. Lynch (2003:28) emphasises that the evaluator requires expertise and the ability to approach the evaluation context from both perspectives "with equal belief, understanding, and allegiance to both". He argues that even if this were true, the mixing of research paradigms could result in contradictory findings as there is "no guarantee that the positivist evidence and the interpretivist evidence will 'triangulate' around a single 'truth'".

It cannot be denied that these cautions make sense and are worth taking into account when the evaluator and evaluation team have to choose an evaluation approach. However, the guidance does seem to be prescriptive, although Lynch (2003: 20) is at pains to appear objective and flexible in his advice: "I use the first person here consciously, in order not to sound as if I am preaching to the reader". Lynch (2003:20-

36) present the benefits of a mixed evaluation design much more convincingly from a practical example than in theoretical discussions on paradigm choices.

A seeming lack of flexibility in the presentation of paradigms (Lynch, 2003:20-2) has limited the effectiveness of the model to allow for an epistemological description of pragmatism relevant to the present study.

The second reflexive comment concerns the effectiveness of Lynch's (1996:4) CAM to facilitate an appropriate or relevant evaluator stance for the selection of a valid evaluation design. Lynch (2003:15) explains that he uses the concept *evaluation team* to refer to individual evaluators, as well as to evaluators working in teams. This explanation consequently encourages a flexible approach to the selection of individual evaluators or evaluation teams relevant to the requirements of the evaluation context.

One of the conclusions reached by Lynch (1992:93-4) in his evaluation of the REST Project is that the evaluation "would have been improved further if an 'outsider' – someone not familiar with the UdeG or REST – had been able to spend some time with the Project to observe and interview the participants". Alderson and Beretta's (1992:97) postscript to Lynch's recommendation presents a less positive appreciation of the appropriateness for outsider involvement in language programme evaluations. Alderson and Beretta (1992:97) offer the following reflexive comment: "Lynch believes such an outsider could have made a valuable contribution, but he does not mention the suspicions, hostility, obstructions and evasions that outsiders might meet".

The above comment of Alderson and Beretta (1992:97) leads to a consideration of a collaborative or participatory approach to research in general, and to evaluation and second language learning and teaching research in particular (cf. Patton, 1990; Nunan, 1993; De Vos, 2001; Mackey & Gass, 2005; Burns, 2005). The evaluation of an ESP Project conducted by Alderson and Scott (1992:25 -58) explores the concept of *participatory evaluation*. According to Alderson and Scott (1992:38), a participatory evaluation "will involve the sharing of decisional, planning roles as well as the donkey-work amongst all involved". The participants also need to benefit from the work carried out. Patton (1990:128) summarises participatory evaluation as something the participants in the programme "undertake as a formal, reflective process for their own development and empowerment". Alderson and Beretta (1992:58) reflect that the promotion of participatory evaluation as the only way to approach evaluations is too rigid.

The guidance on the evaluator's stance provided in Lynch (2003:20-21) links the evaluator's judgement call to the evaluator's own social and political beliefs, to the requirements of the evaluation audience and to the evaluation research paradigms. However, this discussion on the evaluator's role (Lynch, 2003:20-21) does not provide a specific description of the evaluator's objective and/or participatory role in relation to the data collection methods and procedures. Brown (cited in Nunan, 1993:199) provides explicit guidelines on the evaluator's role as an "outsider looking in" and as a "facilitator drawing on information". These detailed guidelines would have furthered the validation of the evaluator's pragmatic stance in the evaluation of the English as LoLT Course.

The third reflexive comment concerns clarity of description in Lynch's (2003:5) use of the term *strategy*. Lynch (2003:5) uses *strategy* to describe an approach as well as an evaluation design could lead to confusion. Lynch (2003:5) defines an approach as a "combination of paradigm and strategy for designing and carrying out the activities of assessment and evaluation". The meaning of the term *strategy* in this definition seems to refer to the role of a strategy as an overall plan for an evaluation programme. Following this interpretation, the evaluator chose illuminative evaluation (Parlett & Hamilton, 1975) as an evaluation strategy: an overall plan to provide coherence to the various evaluation activities of the English as LoLT Course.

The term *strategy* also appears in Lynch's (2003:27) description of mixed strategies where the evaluation design is primarily from one design, but data-gathering and analysis techniques from both paradigms are used. The term *strategy* therefore seems to be linked to a data collection and analysis plan in a mixed evaluation design. Lynch (2003:27) provides examples and references of examples on mixed strategies, as well as a vignette (cf. Lynch, 2003:35-36). Following this interpretation of the term *strategy*, the use of illuminative evaluation is limited to a data collection and analysis plan of an evaluation design. Lynch (2003:25) provides a clear description and reference to illuminative evaluation as an 'illumination model' in an interpretivist evaluation design, although he argues that it could rather be viewed as a mixed evaluation design.

The evaluator has therefore chosen to explore both ways in which the term *strategy* is used in the evaluation approach and design of the English as LoLT Course. Illuminative evaluation is used as an overall evaluation plan for the English as LoLT Course. In addition, the evaluator uses the illumination model in the impact assessment phase of the English as LoLT Course (cf. Section 5.4.3).

5.6 Conclusion

The application of the fourth step of Lynch's (1996:4) CAM in this chapter has led to the creation of a mixed evaluation design in the case study of the English as LoLT Course. The evaluator combined the underlying knowledge claim of pragmatism with the eclectic nature of the illuminative evaluation strategy to validate the selection of a mixed method evaluation design. This mixed method research approach allowed for the presentation of richer sets of data to the multiple evaluation audience. In addition, the broader scope of underlying evaluation perspectives and a more diverse data profile could increase the validity of this language programme evaluation.

In the case of the English as LoLT Course, the answer to Lynch's (2003:30) question posed at the beginning of this chapter about the type of evidence required to make a convincing argument, lies in the selection of a mixed evaluation design.

However, the degree of its persuasiveness depends on a detailed evaluation of the English as LoLT Course. The following five chapters describe the data collection, analysis and evaluation of the needs assessment, programme monitoring and impact assessment phases in more detail (cf. Chapter 1, Section 1.5). In addition, the effectiveness of Lynch's (1996:4) CAM is evaluated in each phase (cf. Chapters 6, Section 6.4; Chapter 8, Section 8.3; Chapter 10, Section 10.5).

CHAPTER 6

PHASE ONE: NEEDS ASSESSMENT OF THE ENGLISH AS LoLT COURSE CASE STUDY

6.1 Introduction

This chapter evaluates the needs assessment phase in the English as LoLT Course case study. It describes the process of progressive focusing (Parlett & Hamilton, 1975:148) in moving from an assessment of the broader context of the study (Stage 1a) to the needs analysis of Intermediate Phase teachers in the four IDDP schools (Stage 1b) (cf. Figure 3). In addition, the meta-evaluation section of this chapter assesses the effectiveness of the guidance provided in Lynch's (1996:4) CAM in the needs assessment phase of this case study (cf. Chapter 2, Section 2.4.4).

The chapter presents a description, evaluation and meta-evaluation of the assessment phase in three major sections. The first section describes the purpose and design of the needs assessment phase. This description is followed by an analysis of the broader education context of the study (cf. Figure 3, Stage 1a). A description of the purpose, method of research, data collection and analysis procedures of the IDDP curriculum baseline survey (cf. Figure 3, Stage 1b) is then presented. The second section offers a descriptive evaluation of the Intermediate Phase teachers' curriculum delivery needs according to seven evaluation themes (cf. Chapter 5, Section 5.4). The third section presents an analysis of Lynch's (1996:4) CAM to guide a valid needs assessment for the design of the English as LoLT Course. Reflexive comments on the internal validity and reliability of the needs assessment and on its usefulness are presented.

6.2 A Description of the Needs Assessment Phase

6.2.1 The Purpose of the Needs Assessment Phase

The purpose of the needs assessment phase was informed by the specific aims of the programme evaluation stages in this case study (Chapter 1, Section 1.3). The first specific aim was to analyse the broader context of the study for the design of the intervention programme (cf. Figure 1, Stage 1a). The second specific aim was to identify the needs of the Intermediate Phase teachers using English as the LoLT to inform the design of the language programme (cf. Figure 1, Stage 1b).

6.2.2 The Research Design of the Needs Assessment Phase

The needs assessment phase used a mixed evaluation design that followed a sequential procedure for data collection and analysis in line with Creswell's (2003:16) Mixed

Methods Approach (cf. Figure 3). The writer as evaluator and as project manager conducted a content analysis of the IDDP Contextual Baseline Survey Report (cf. Strauss, 2002). Leedy and Ormrod (2001:155-7) describe the content analysis process as a qualitative research procedure. This analysis provided the 'bigger picture' of the development project in a sample of four of the ten IDDP schools (cf. Figure 3, Stage 1a).

In addition, the writer analysed the findings of two provincial systemic evaluations conducted by the National Department of Education (cf. DoE, 2003b; FS DoE, 2005). These content analyses defined the Intermediate Phase teaching needs in the Free State education context as part of the South African education system in relation to the needs of the Intermediate Phase teachers of the four IDDP schools (cf. Chapter 5, Section 5.4.1.1).

The writer as evaluator then conducted a curriculum baseline survey of the specific needs of twenty-six Intermediate Phase teachers in the four IDDP schools (cf. Figure 3, Stage 1b). The survey followed a one-shot cross-sectional survey design that allowed for the concurrent collection of quantitative and qualitative data (cf. Section 6.2.6.2).

The pragmatic stance of the writer as evaluator resulted in a process of progressive focusing. It moved from general features to specific issues in the Intermediate Phase education context of the four IDDP schools. The needs assessment phase in this case study therefore followed the illuminative evaluation strategy of progressive focusing on the learning milieu and on the curriculum (Parlett & Hamilton, 1975:144-5). The first stage of this language programme evaluation (cf. Figure 3, Stage 1a) explored the IDDP education context as a context for evaluation. A brief description of the various dimensions in an education context as a context for evaluation follows.

6.2.3 *An Education Context as a Context for Evaluation*

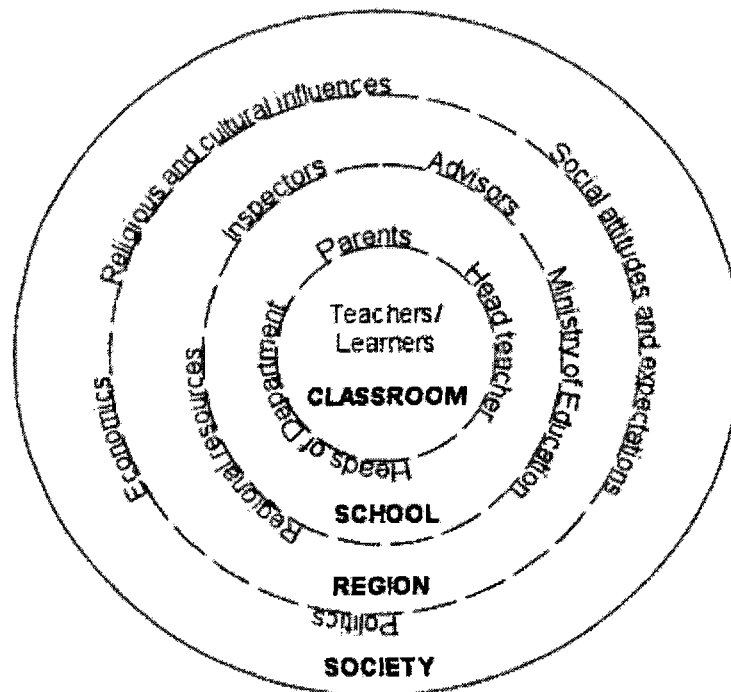
Rea-Dickins and Germaine (1992:19) emphasise the fact that the education context informs the evaluation context: "The relationship between evaluation and the context in which the evaluations are undertaken is of fundamental importance". Lynch (1996:5) defines the education context as "the essential phenomena or features that characterize the programme and its setting".

Both Lynch (2003:19) and Rea-Dickins and Germaine (1992:19) view the education context as multi-dimensional and multi-levelled. The education context ranges from a particular language programme in the classroom to general socio-political and cultural influences on the education system as a whole. Rea-Dickins and Germaine (1992:19)

offer a schematic presentation of a range of features that are part of an education context for evaluation (cf. Figure 4).

Figure 4: A Context for Evaluation

(Rea-Dickins & Germaine, 1992:19)



The education context in the Intermediate Phase classrooms of the four IDDP sample schools is shaped by the various levels, role players and influences in the wider context of the South African education system. A description of a content analysis of this education context as part of the first programme evaluation stage (cf. Figure 3, Stage 1a) follows.

6.2.4 Programme Evaluation Stage 1a: A Content Analysis of Existing Resources

According to Leedy and Ormrod (2001:155), a content analysis is “a detailed and systematic examination of the contents of a particular body of material for the purpose of identifying patterns, themes, or biases”. The writer as evaluator conducted a content analysis of existing resources to identify the main features for the design of Intermediate Phase teacher development programmes in the first programme evaluation stage (cf. Figure 3, Stage 1a) of the English as LoLT Course. A brief description of these existing resources follows.

6.2.4.1 The IDDP Contextual Baseline Survey Report

The purpose of this content analysis was to define the main features for the design of a teacher development programme in the broader education context of four out of ten IDDP schools (cf. Chapter 5, Section 5.4.1.1). An analysis of the findings of the IDDP Contextual Baseline Survey Report (cf. Strauss, 2002) identified Outcome-based Education (OBE) and the language of learning and teaching as main features for Intermediate Phase teacher development in the four IDDP sample schools.

The findings in the report were derived from quantitative data collected by the IDDP project coordinator in the Thabo Mofutsanyana District. Questionnaires were completed by 4 principals, 28 teachers, 128 Grade 5 learners and 128 parents/guardians of the Grade 5 learners in May 2002. The data were analysed by a professor from the Research Institute for Education Planning of the University (RIEP) of the Free State. The IDDP Contextual Baseline Survey Report (cf. Strauss, 2002) was provided in June 2002.

The questionnaires were organised according to education indicators formulated by the Chief Directorate: Quality Assurance at the National Department of Education. These education indicators formed part of a national systemic evaluation framework which consists of context, input, process and output (CIPO) indicators (cf. DoE, 2001).

In addition, the findings of provincial systemic evaluation baseline surveys were used to increase the validity of the findings in the IDDP Contextual Baseline Report (cf. Strauss, 2002). A brief description of the relevant surveys follows.

6.2.4.2 Provincial Systemic Evaluation Baseline Surveys

The provincial systemic evaluation baseline surveys (cf. DoE, 2003b; FS DoE, 2005) measured the impact of national OBE policies on the immediate education contexts in schools. These surveys were designed, coordinated, and interpreted by the national Department of Education. The systemic evaluations were conducted in a representative sample of 72 primary schools in the Free State Department of Education. They were conducted at Foundation Phase level from September to October 2001 (cf. DoE, 2003b) and at Intermediate Phase level from September to October 2004 (cf. FS DoE; 2005). Both systemic evaluations were conducted as baseline surveys which measured the effectiveness of OBE for the first time since the inception of the new education system in 1994.

The systemic baseline surveys (cf. DoE, 2003b; FS DoE, 2005) were also based on the same systemic evaluation framework consisting of context, input, process and output (CIPO) indicators (cf. DoE, 2001) that structured the IDDP Contextual Baseline Survey Report (cf. Strauss, 2002). Findings according to the CIPO education indicators in the Free State Report on Systemic Evaluation in the Foundation Phase (cf. DoE, 2003b) and in the Intermediate Phase Systemic Evaluation Free State Report (cf. FS DoE, 2005) were presented under the transformational goals of access, quality, and equity.

Two major recommendations of the Free State Report on Systemic Evaluation in the Foundation Phase (cf. DoE, 2003b) are that learning support materials must be made available to learners and that access to in-service training by all teachers should be prioritized so that teaching practices can be improved. The report furthermore comments that “although educators have received in-service training on OBE, many do not feel confident enough to implement it” (DoE, 2003b:56).

Findings on the implementation of OBE and the language of learning and teaching were presented under the transformational goal of quality in the Intermediate Phase Systemic Evaluation Free State Report (cf. FS DoE, 2005: 31-50). This report (FS DoE, 2005:109) recommended that the provisioning of continuing professional development for teachers in Mathematics, Natural Sciences and Languages (LoLT) be optimised to improve the quality of learning and teaching in the Free State Province.

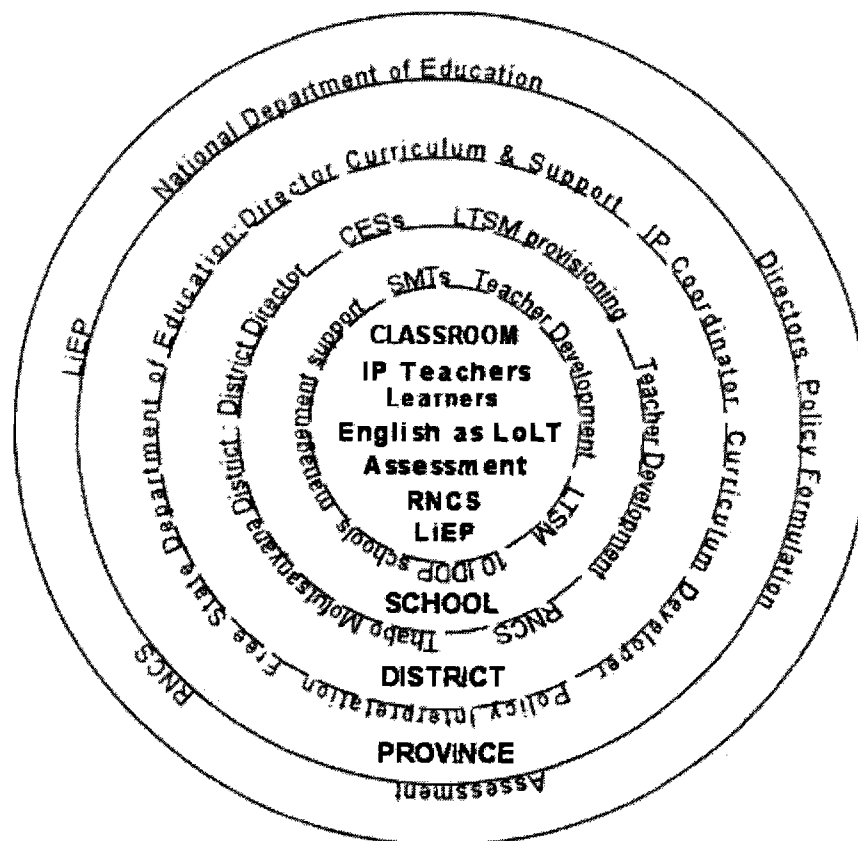
A content analysis of the findings in all three baseline surveys described above (cf. Section 6.2.4) led to a schematic presentation of the following main features in the IDDP education context for evaluation.

6.2.5 *A Schematic Presentation of the Education Context for Evaluation in the IDDP Schools*

This section offers a schematic presentation of the education context for evaluation in the IDDP schools (cf. Figure 5). The presentation is adapted from Rea-Dickins and Germaine’s (1992:19) presentation of a context for evaluation offered in Section 6.2.3 of this chapter (cf. Figure 4).

Figure 5: An Education Context for Evaluation in the IDDP Schools

(Adapted from Rea-Dickins & Germaine, 1992:19)



The inner circle represents the Intermediate Phase (IP) teachers and learners in the classrooms of the four IDDP schools. The Outcome-based Education (OBE) system is outlined in the Revised National Curriculum Statement (RNCS) Policy (cf. DoE, 2002a). The RNCS Assessment Policy (cf. DoE, 2002a) provides guidelines on the implementation of continuous assessment. This policy forms part of the RNCS Policy. The Language-in-Education Policy (LiEP) (DoE, 1997) provides guidelines to the schools on the selection and implementation of the language of learning and teaching. English is the language of learning and teaching in the four IDDP schools.

The second circle represents the management support level of the school. The School Management Teams (SMTs) provide support to the learning and teaching activities in the classrooms of the four IDDP schools. The provision of learning and teaching support material (LTSM) and teacher development programmes are focus areas for management support to improve the quality of learning and teaching in the Intermediate Phase classrooms.

The third circle indicates the type of management support required from the Thabo Mofutsanyana District to ensure the implementation of quality learning and teaching in the Intermediate Phase classrooms. The Thabo Mofutsanyana District Director and the Chief Education Specialists (CESs) manage the provision of learning and teaching support material (LTSM) ordered by the IDDP schools from the district. The Chief Education Specialist (CES) responsible for curriculum support to schools manages the provision of RNCS courses to Intermediate Phase teachers. The RNCS in-service training courses are aimed at developing teachers' confidence and skills in the implementation of OBE in their classrooms.

The fourth cycle represents the type of provincial support required for quality learning and teaching in the Intermediate Phase classrooms. The Director responsible for curriculum delivery and support manages the interpretation of the national RNCS and Assessment Policies (cf. DoE, 2002a) and the Language-in-Education Policy (cf. DoE, 1997) at provincial level. The Free State policy interpretation at district and school level is monitored and supported by the provincial Intermediate Phase Coordinator for curriculum development.

The outer circle indicates the support provided to the implementation of the above-mentioned policies at national level. The formulation of these policies to ensure the implementation of quality is managed by the relevant directors at the national Department of Education.

The content analysis of the existing baseline surveys (cf. Strauss, 2002; DoE, 2003b; FS DoE, 2005) provided evidence that the Intermediate Phase teachers and learners needed support to participate meaningfully in OBE and to use the language of learning and teaching effectively.

Once the outlines of the 'bigger picture' presented above had become apparent, a more detailed exploration of teaching and learning needs at classroom level was required in order to design a meaningful intervention programme. A specific needs analysis had to be conducted to design a language intervention programme for the professional development of the Intermediate Phase teachers in a sample of four IDDP schools. The same four schools sampled for the IDDP contextual baseline survey were used for the curriculum survey. A description of this specific needs analysis in the IDDP curriculum baseline survey during the second part of the first language programme evaluation stage (cf. Figure 3, Stage 1b) follows.

6.2.6 Programme Evaluation Stage 1b: Needs Analysis of Intermediate Phase Teachers using English as LoLT

Hyland (2006:73) points out that needs analysis is a continuous process that actually shades into evaluation – the means of establishing the effectiveness of a course. He also points out that *needs* is actually an umbrella term that may incorporate many aspects, such as learners' backgrounds and goals, their language proficiencies, their teaching and learning preferences and so on.

A needs analysis typically involves an analysis of the learners' present situation (cf. Dudley-Evans & St John, 1998) and collects information about learners' current skills and competencies. It also takes into account the target situation, which involves information on the knowledge and language skills learners need to perform competently in their professions, especially in the specific contexts in which they need to function (Hutchison & Waters, 1987:63).

In addition, needs analysis is generally regarded as the starting point in any course design (cf. West, 1997). It is part of a long tradition in curriculum design (e.g. Taba, 1962; Nicholls & Nicholls, 1978). It refers to the collection of information relevant to course design; it is the means of establishing the how and what of a course.

Information on needs can be collected in a variety of ways (cf. Brown, 1995; 2002). Hyland (2006:78) states that needs are typically established by means of observations, interviews, questionnaires and informal consultations.

A needs analysis of learning and teaching in twenty-six Intermediate Phase classrooms of the four representative project schools took place from 5 to 8 August 2002. The writer as evaluator was assisted by two professors from the North-West University's School of Languages.

The following description of the curriculum baseline survey describes its purpose, method of research, data collection, and analysis procedures. The information in this sub-section summarises and interprets the detailed description of the study presented in the IDDP Curriculum Baseline Report (cf. Mostert *et al.*, 2002).

6.2.6.1 Purpose of the Survey

The purpose of this needs analysis was to identify the Intermediate Phase teachers' classroom practice needs to inform the design of the English as LoLT Course. The

IDDP curriculum baseline survey conducted a specific needs analysis of Intermediate Phase teachers' OBE teaching practices in Mathematics, Natural Sciences and English as the first additional language. In addition, the survey assessed the way in which these teachers used English as the language of learning and teaching.

6.2.6.2 Method of Research

Design

A cross-sectional survey design was used. This design was a specific mixed evaluation design which allowed for the concurrent collection of quantitative and qualitative data.

Participants

An evaluation team of six observers participated in the data collection phase of the study. The observers in each team represented the North-West University School of Languages, the Free State Department of Education (FS DoE) and Sacred Heart College Research and Development Unit (SHC R&D). They were randomly divided into two teams of three observers each. The IDDP project manager and the provincial Intermediate Phase Coordinator monitored the data collection process in addition to being observers.

A total of twenty-six teachers participated in this curriculum baseline survey. The selected teachers were responsible for teaching Mathematics, Natural Sciences and English as an additional language to Grades 4 to 6 learners in the Intermediate Phase. These teachers used English as the language of learning and teaching (LoLT) in all four IDDP schools because their school governing bodies had selected English as the medium of instruction. Teachers were observed and interviewed over a period of four days.

Participants therefore represented the evaluation interests of research, curriculum delivery and support, and project management. They furthermore represented the evaluation interests of accountability, curriculum development and teacher self-development.

Instrumentation

The two professors from the North-West University School of Languages developed an observation questionnaire (cf. Appendix A). The questionnaire was developed in consultation with an Intermediate Phase Teacher from Sacred Heart College, the

learning facilitators of the Thabo Mofutsanyana District and the IDDP project manager. The development of the questionnaire was based on a literature review as well as on the input from various established researchers.

The observation questionnaire consisted of four observation sheets. Observers used the first observation sheet to observe the learning experiences in the classrooms; the second to assess teachers' planning and organisation skills; the third for an interview with teachers and the fourth to monitor learners' work.

The questionnaire had a twofold data collection purpose, the collection of quantitative data (specifically frequency counts) and of qualitative data (narrative reports made by the observers). The qualitative comments made by the observers constituted the major focus of the study. The data collected by the observers presented a predominant set of qualitative data typically found in a case study. No reliability estimates for the sub-scales were calculated.

Data collection procedure

The writer as IDDP project manager held a benchmarking session of two and a half hours prior to the actual data collection at the schools to ensure that all observers understood and interpreted the questionnaire in the same way. Various refinements were made to the questionnaire (e.g. terminology). Data collection procedures were also standardised during this meeting to increase the reliability of the data collection process.

The data were collected over a period of four days (5 to 8 August 2002). Each team visited the same school on two consecutive days to ensure minimum disruption in terms of strange faces appearing in classrooms. The evaluation team made this arrangement to increase the familiarity of the learners and teachers with their observers, even over a very short period of time. They wanted to increase the validity of the survey findings through minimising the positivist validity threats of the "observer's paradox" and the Hawthorne effect (Mackey & Gass, 2005:176).

The term *observers' paradox* is used by Labov (cited in Mackey & Gass, 2005:176) to refer to the paradox between the intended, unobtrusive classroom observation and the actual presence of the observer that could influence the linguistic behaviour of the teachers and learners being observed. According to Mackey and Gass (2005:176), the Hawthorne effect occurs when learners' performance might improve during classroom observation, because they realise that they are under observation.

In addition, the use of observation teams ensured that two observers rated the same lesson in all cases in order to increase the reliability of the survey. Mackey and Gass (2005:358) define interrater reliability as “consistency between two or more raters”. The observers discussed the scores after each lesson observation and then averaged their ratings. McNamara (1996:117) indicates that the practice of averaging ratings is a common one to ensure fairness and reliability. The use of an observation team of at least two raters per class controlled the interrater reliability of the observation scales operationally.

After each day of observation, all observers met for a feedback session. The purpose of these sessions was further to improve the reliability of the data collection through a standardisation process. It ensured that all observers were still observing the same thing and in the same manner. The observers also discussed problems that occurred during observation. The writer as project manager coordinated these standardisation meetings. The writer as researcher participated in the discussions that were led and monitored by a professor from the North-West University.

Data analysis

Data in 5-point Likert frequency and quality rating scales (Lynch, 2003:71) were analysed quantitatively (i.e. means, standard deviations, percentages) as well as qualitatively (i.e. narrative reporting by the observers). A total number of forty seven frequency rating scales, one quality rating scale and one yes-no alternative answer were analysed in the learning experience or lesson observation schedule. The rating scales of Observation Sheet 1 (cf. Appendix A) measured the following categories of classroom characteristics: written preparation; presentation; atmosphere and relationships; learner experience; resources; achievement of learning progress; professionalism; use and usage of the English language. The descriptive comments at the end of each category and the final summary of comments at the end of the lesson were summarised per category. These qualitative comments were used to further clarify and explain the descriptive statistics of the rating scales.

A total number of thirty frequency rating scales and one factual, yes-no alternative answer were analysed to measure observers' responses to teacher planning and organisation in Observation Sheet 2 (cf. Appendix A). Observers' responses to the content analysis of teachers' learning area files were categorised as follows: availability of policy and planning documents; planning reflects OBE methodology; planning makes provision for a variety of assessment methods/techniques;

maintenance of learners' records; planning includes a variety of learning resources suitable to the needs of learners and a variety of learning experiences. Descriptive comments of the observers at the end of each category and the observers' comments and advice were analysed per category (cf. Mostert *et al.*, 2002: Appendix B).

Observers' narrative descriptions of teacher responses to ten questions of the interview guide were analysed in Observation Sheet 3 (cf. Appendix A). Teachers' recorded reflections on the following categories were analysed: strengths and weaknesses in their teaching and classroom experiences; the three biggest problem areas that had a negative effect on their teaching; three aspects that had a positive effect on their teaching; teachers' feelings about their learners, teaching, school, departmental and independently sourced support; and communicative language teaching. In addition, four quality rating scales were analysed to measure teachers' self-assessment of their language ability.

A total number of five frequency rating scales in Observation Sheet 4 (cf. Appendix A) were analysed to assess learner work samples with the teacher. The following aspects were assessed: regular monitoring of learner work; the relevance of the content of learner work to the specific outcomes; the variety of learner tasks; the appropriateness of feedback given to learners; and the meaningfulness and adequacy of learner homework.

The writer used the findings of the data analysis described above to present a descriptive evaluation of the twenty six Intermediate Phase teachers' needs in using English as the LoLT.

6.3 A Descriptive Evaluation of Intermediate Phase Teachers' Needs in using English as the LoLT

This section describes the findings of the curriculum baseline survey presented in the IDDP Curriculum Baseline Survey Report (cf. Mostert *et al.*, 2002). The findings of the IDDP Contextual Baseline Survey (cf. Strauss, 2002) and of the provincial systemic evaluation surveys (cf. DoE, 2003b; FS DoE, 2005) contributed to the validity of this descriptive evaluation.

The findings of all the above-mentioned surveys combine to yield a rich description of the twenty six Intermediate Phase teachers' curriculum delivery needs using English as the LoLT in

the four IDDP schools. The description follows the seven evaluation themes identified for the evaluation of the language programme (cf. Chapter 5, Section 5.4.1).

As mentioned before (cf. Chapter 5, Section 5.4.1), the seven evaluation themes explore: the tension between Outcomes Based Education policy and classroom practice; English language learning and teaching; teacher and learner motivation and attitude toward learning and teaching; management support to the implementation of English as the LoLT; the role and status of English in the project schools; the role and status of the Intermediate Phase teachers in curriculum decisions; and the role and status of English in the Phuthaditshjaba community.

A detailed descriptive evaluation according to each theme follows.

6.3.1 *Tension between Outcomes-based Education Policy and Classroom Practice*

The National Department of Education provides guidelines for learner and teacher participation in learning, teaching, assessment and management support in the Revised National Curriculum Statement (RNCS) Policy (cf. DoE, 2002a). This policy is derived from the principles of Outcomes-based Education (OBE). The Free State Department of Education provides guidelines on the interpretation of OBE policies on a regular basis (cf. FS DoE, 2004a:1,2 as an example). The various roles of teachers in OBE are outlined in the Norms and Standards for Educators (cf. DoE, 2000a).

The tension between effective learning and teaching according to OBE policies and the less effective learning and teaching practices in the Intermediate Phase classrooms of the IDDP schools created evident gaps. These gaps were primarily identified in teachers' planning and presentation of their lessons observed in the IDDP Curriculum Baseline Survey (cf. Mostert *et al.*, 2002). The following findings describe statistical and narrative assessments of teachers' lesson planning and presentation. Findings from the existing baseline surveys (cf. DoE, 2003b; FS DoE, 2005) further clarify and support these assessments.

Lesson Planning

Teachers' identification of the phase organiser/capability task was rated as average (3.2) (cf. Mostert *et al.*, 2002: Table 1 – WP 5, Appendix B). Some teachers offered a rather vague interpretation of terms such as *programme* and *phase organisers*. In addition, teachers did not easily understand the distinction between *capability* and *resource tasks*, which were introduced by the Free State Department of Education to assist teachers

with their lesson planning. The IDDP Curriculum Baseline Survey Report (Mostert *et al.*, 2002:6) concluded that it “was clear that some OBE terminology, which can be very technical, was not very useful in practice”.

The quality of lesson planning was evaluated as average (3.5) (cf. Mostert *et al.*, 2002: Table 1 – WP 1b, Appendix B). All teachers had prepared the observed lesson in writing, but the quality of the preparation varied from detailed to fairly superficial. Documentary evidence of systematic lesson plans in teachers’ files prior to the observed lesson was mostly lacking. Most lessons were prepared on loose pages and, in some cases, only a few lesson plans were contained in the teacher’s file, dating back only to a month prior to the curriculum survey.

The format of lesson plans varied. In most cases, it was evident that teachers did not quite understand how to complete the complex forms for lesson planning provided by their learning facilitators. Teachers were required to complete no less than twenty aspects on a lesson plan. Despite this requirement for detail, there was no clear indication of the stages of a lesson/ learning experience in the lesson plans. The progress of the lesson could therefore not be planned and followed clearly.

All lesson plans contained outcomes in one form or another. These outcomes were listed and numbered, especially the specific outcomes and assessment criteria. The tendency to list too many outcomes for a single lesson was observed. The IDDP Curriculum Survey Report (Mostert *et al.*, 2002:6) commented on the fact that the codes of ‘OBE-speak’ were not apparent to “the uninitiated observer”. The outcomes seemed to be merely listed in a fairly mechanical manner, as lesson plans provided little indication of how these outcomes were to be assessed. In some cases, outcomes were too general and/or not specific enough to the learning context of the learners.

In addition, it was evident that teachers found it difficult to plan for the development of learners’ attitudes and values in a learning experience. The report commented on the difficulty of specifying attitudes and values at the best of times and emphasised the need to assist teachers in their planning for attitudes and values in a simple and comprehensible way (cf. Mostert *et al.*, 2002:6).

Teachers’ ability to integrate the focus learning area with other learning areas also proved problematic and was evaluated as below average (2.5) (cf. Mostert *et al.*, 2002: Table 1 – WP 4, Appendix B). Observers commented that teachers found the integration of different learning areas difficult. Their impressions were that teachers planned for

learning area integration in a very mechanical way. They merely wrote down other learning areas in lesson plans, but no integration took place during the lessons.

The IDDP Curriculum Baseline Survey Report (Mostert *et al.*, 2002:13) concluded that lesson preparation “was problematic in that there were complicated formats and superficial preparation in some instances.”

The following needs of the Intermediate Phase teachers observed in their planning of the learning experience became apparent:

- simplification of the planning format;
- clarification of outcomes, values and attitudes;
- clarification of OBE terminology; and
- the formulation of appropriate specific outcomes that are relevant to the context and to the learners.

Presentations of the learning experiences/lessons

Teachers' observed lesson presentations were scored at an average of 3.4 (cf. Mostert *et al.*, 2002: Table 2, Appendix B). Teachers' subject knowledge was mostly good (although one teacher advocated that a cat should be washed, and others made minor factual errors in class). This finding correlates with the quantitative statistics presented in the IDDP Contextual Survey (Strauss, 2002:5-6). Principals indicated that approximately 25% of the teachers in the Intermediate Phase were un(der)qualified. However, more than half of the teachers (60,7%) had between 5-20 years of teaching experience in the Intermediate Phase.

The most problematic aspect reported was the *variation of interaction patterns*, which was rated at 2.8 (cf. Mostert *et al.*, 2002: Table 2 – Pres 21, Appendix B). The IDDP Curriculum Baseline Survey Report (Mostert *et al.*, 2002:7) indicated that, in some classes, teachers spoke most of the time, although group work was also used. The question-and-answer technique dominated, with yes-no type of questions featuring prominently. Teachers often made use of repetition, in a choir format. Repetition was mostly oral, with little writing done in class.

Mostert *et al.* (2002:7) report that large classes, in some cases forty to fifty learners in one class, contributed to limited variation of interaction patterns. Strauss (2002:32) confirmed this finding, concluding that the sizes of the classes did not provide a context that was conducive to learning and teaching. This conclusion was based on the finding that the educator ratio of more than forty learners per teacher had led to overcrowded

classrooms (Strauss, 2002:11). Fifty or more learners were found in 33% of grade 4 classes, 25% of Grade 5 classes, and 25% of grade 6 classes. (cf. Strauss, 2002: 11, Table 2.11).

In addition, the ages of the 128 Grade 5 learners sampled in the IDDP Contextual Baseline Survey ranged from 10 to 17 years (Strauss, 2002: 10). Learners older than 13 years in this sample were seen as over-aged. Twelve percent of the learners were over-aged (cf. IDDP Contextual Baseline Report, 2002:11, Figure 3.3). This learner characteristic highlighted the need to develop teachers' skills to increase the variation of interaction patterns, which would accommodate over-aged learners.

Observers' narrative descriptions assessed *the management of group work* as problematic. The seating in all classes visited was arranged in groups. However, this seating arrangement didn't guarantee the effective implementation of group work as a preferred OBE methodology for collaborative learning. Group work in OBE promotes active learner participation which requires special planning and facilitation skills from a teacher (Killen, 2000:72-98).

Observers' narrative descriptions of learner experience during a lesson presentation (Mostert *et al.*, 2002:9) indicated that interaction patterns were mostly dominated by teachers, despite the use of group work. However, learner experience was rated on average at 3.5 (cf. Mostert *et al.*, 2002: Table 5, Appendix B). This descriptive statistical assessment where 3 signified *sometimes* on a five-point frequency rating scale ranging from never (1) to always (5) (cf. Appendix A), did not clearly identify active learner participation in group work as problematic. The quantitative assessment therefore showed an inconsistency with observers' qualitative assessment of learner experience.

However, quantitative data from the IDDP Contextual Baseline Survey Report (cf. Strauss, 2002:18) confirmed the observers' qualitative observations of teacher-dominated lesson presentations. Learners gave a low rating to opportunities provided for their participation in classroom learning activities (cf. Strauss, 2002:18, Figure 3.4). Learners rated discussions about what they were learning at an average of 39,5%. On the other hand, they rated the activity of following in the textbook while the teacher was talking about the work at an average of 56,6%. The qualitative data from the IDDP Curriculum Baseline Survey Report (Mostert *et al.*, 2002:9) and the quantitative data from the IDDP Contextual Baseline Survey Report (Strauss, 2002:18) provided convincing evidence that learning experiences were teacher-dominated (cf. Section

6.4.1). Attention to the facilitation of learner-centred participation in learning experiences was therefore required.

Mostert *et al.* (2002:7) reported that only some group tasks were challenging, but that the majority of tasks were very elementary and did not succeed in involving all the learners in a group. Only one task sheet was often distributed per group. Consequently only one or two learners performed the task, while others were mere onlookers. This meant that only one or two learners in a group read the task sheet. Observers' narrative descriptions thus identified the facilitation of learner experience in group interaction as problematic. However, the descriptive statistical assessment indicated an average of 3.5 (cf. Mostert *et al.*, 2002: Table 2 – Pres 11, Appendix B). This descriptive statistical assessment did not highlight the facilitation of active learner participation in group work as problematic. Nevertheless, the narrative reports of the observers based on their analysis of teachers' written lesson preparation and on their observations of the lesson presentations provided convincing evidence that the facilitation of active learner participation in group work needed attention.

Observers also questioned the almost exclusive use of the group work format. Pair work did not occur, while class work was used to some extent during the presentation phase of most lessons. Individual work occurred only in a few instances at the end of a lesson. These observations were also confirmed in the IDDP Contextual Baseline Survey (cf. Strauss, 2002:18, Figure 3.4). Learners rated opportunities for problem solving on their own at an average of 42.2%. Learners gave a higher rating to the following activity which indicated that learning was still teacher centred: "We repeat what the teacher says" (52.3%).

In addition, observers' narrative descriptions identified the *pacing of the learning experience* as problematic. Several observers commented on the progression of the learning experience at a very slow pace, with a lot of time devoted to very little content. According to the IDDP Curriculum Baseline Survey Report (Mostert *et al.*, 2002:7), something which could be explained in four or five minutes took up 45 minutes of class time. This was a common observation. One teacher, for example, spent half an hour on the teaching of three prepositions in English.

However, the analysis of the descriptive statistics rated the pacing of the learning experience at an average of (3.3) (cf. Mostert *et al.*, 2002: Table 2 - Pres10a, Appendix B). Nevertheless, the narrative descriptions of the observers provided more convincing evidence of the lack of pacing in teachers' facilitation of the learning experiences. The

survey concluded that “class time was not effectively utilized.” (IDDP Curriculum Baseline Survey Report, 2002:7).

The above inconsistencies between the quantitative and qualitative data analyses could be attributed to observers’ indecisive use of a five-point Likert rating scale (Lynch, 2003:71). According to Brown (cited in Lynch, 2003:71), some respondents have a tendency to choose the middle point as a neutral non-opinion option, rather than declaring a clear position. The frequency rating scales in Observation Sheet 1 on lesson presentation (cf. Appendix A) offered the observation teams the neutral option of *sometimes* (3). Brown (cited in Lynch, 2002:41) suggests using an even number of options to choose from in order to ensure a decisive response. The appropriateness of this suggestion is highlighted in the meta-evaluation section (cf. Section 6.4.2).

A few observers commented on the lack of *content variety* in lessons. Learners did not learn anything new in a lesson. Observers indicated that learners therefore became disinterested in the class. Stronger learners especially were not catered for, and content was often not challenging. The report (Mostert *et al.*, 2002: 7) suggested that this lack of variety might be related to most teachers’ apparent lack of proper lesson planning and effective pacing of learning experiences.

Closely related to the above suggestion is the apparent lack of *teacher participation* in the learning experience. The 28 Intermediate Phase teachers sampled in the IDDP Contextual Baseline Survey (Strauss, 2002:19) indicated that they did administration (17.9%), lesson preparation (50.0%), and correcting/marking learners’ written tasks (67.9%) during contact teaching time. These percentages indicate that teachers did not seem to view the actual facilitation of the learning experience as an important activity during formal teaching time.

Quite a number of teachers were also busy with activities not normally associated with teaching during formal teaching time, namely: extra-curricular activities such as drama and choir (39.3%), meetings with school principals and other educators (60.7%), further studies for self-development (35.7%) and professional development sessions (35.7%). The above statistics led to the conclusion that teachers did not use contact teaching time effectively (Strauss, 2002: 20). These quantitative statistics increase the validity of the conclusion presented in the IDDP Curriculum Baseline Survey Report (Mostert *et al.*, 2002:7) that “class time was not effectively utilized” (cf. Section 6.4.1)

Worksheets

Work-or task sheets also varied in quality. The worksheets could only be regarded in general as average (3.0) (cf. Mostert *et al.*, 2002:Table 3 – Res 1, Appendix B). Observers found that the task set was not always at the appropriate level; in some cases it tended to be too easy. The quantity was also problematic and the tasks tended to be of an inadequate length. In addition, observers generally commented that learners did not do enough writing.

The IDDP Contextual Baseline Survey Report (Strauss, 2002:31) concluded that the learning experience, as rated by learners and teachers, showed an inclination toward OBE. However, learning and teaching was still largely teacher and textbook-centred, with little learner involvement. Informed management of active learner participation in group work, where teachers understand and implement collaborative learning effectively, was required.

Assessment

Observers reported that, in most cases, *assessment criteria* were not clear to teachers and learners from the onset of an activity. This aspect was rated below average (2.9) (cf. Mostert *et al.*, 2002: Table 2- Pres 8, Appendix B). Teachers did not always succeed in linking the assessment criteria with the selected outcomes. In some cases no assessment took place. In one instance a teacher took in pupils' books after a task, and then gave the answers to the exercise.

In addition, Mostert *et al.* (2002:8) report that observers found little evidence of *continuous assessment*. In some instances, teachers' evaluation of learning progress achievement reflected a lack of summative evaluation at the end of the lesson. Observers rated teachers' ability to do summative evaluation as average (3.1) (cf. Mostert *et al.*, 2002: Table 3 – Achieve1, 2, Appendix B). Mostert *et al.* (2002:8) emphasised the fact that most teachers expressed their concerns with assessment. The report continued to highlight that teachers were unsure of how assessment had to be done in an OBE approach. Teachers requested assistance with exactly how learners were to be assessed and how records were to be kept.

The following needs of the observed Intermediate Phase teachers in their presentation of a learning experience were therefore identified:

- the development of teachers' knowledge and skills to increase the variation of interaction patterns;

- the development of teachers' planning and facilitation skills to manage group work effectively to promote active learner participation in collaborative learning;
- the need to ensure varied types of learner participation through pair, class and individual work in addition to group work;
- the need to introduce content variety through proper lesson planning and effective pacing of the learning experience;
- the development of teachers' skills to use resources effectively;
- the development of teachers' skills to pace the learning experience judiciously to ensure the effective utilisation of contact time; and
- the development of teachers' knowledge and skills in the assessment and recording of learner performance during the learning experience.

Planning and organisation

The tension between policies on Outcomes-based Education (OBE) and classroom implementation became abundantly clear during discussions between the observers and the teachers. Teachers' apparent inadequate understanding and application of OBE policies on planning, methodology and assessment were evident from their learning area files, learners' records and portfolios. The IDDP Curriculum Baseline Survey Report (Mostert *et al.*, 2002:10-12) captures this tension in a narrative analysis of teacher planning and organisation. A statistical descriptive analysis is provided in Tables 7 – 9 of the IDDP Curriculum Baseline Survey Report (cf. Mostert *et al.*, 2002: Appendix B). This analysis is presented in the following paragraphs.

Planning

Planning in terms of OBE principles and practice was a priority, and the teachers had all attended various courses in this. Educators were generally required to have a learning area file which contains relevant circulars, policy documents, syllabuses, newsletters, test and examinations, lessons, etc. The file also contained year and term planning, including planning of various units of teaching-learning and assessment.

Planning was regarded as problematic, with an average score of 2.5 (cf. Mostert *et al.*, 2002: Table 7, Appendix B). No evidence of specific or standardised planning formats for year and term work was observed. In isolated cases there was a form for term planning, or a form designed by a teacher. Only one or two Mathematics teachers possessed a planning grid. Teachers' planning in terms of OBE methodology was rated as below average 2.7 (cf. Mostert *et al.*, 2002: Table 7, Appendix B).

The formulation of skills, values and attitudes in planning proved to be problematic. Teachers found it difficult to express, teach and assess values and attitudes. If at all provided, the skills, values and attitudes did not make much sense, and did not relate to the headings used (Mostert *et al.*, 2002:11).

Planning of assessment was problematic and was rated at an average of 2.6 (cf. Mostert *et al.*, 2002: Table 8, Appendix B). None of the teachers could provide comprehensive records of learner achievement including continuous assessment. The IDDP Curriculum Baseline Survey Report (Mostert *et al.*, 2002:11) found that teachers were unsure about assessment, especially about oral work. Tests occurred only once a term. Class work was assessed once a week in isolated cases. Assessment modes were mainly traditional.

Mostert *et al.* (2002:12) emphasised that the “purpose of portfolios was clearly not filtering through to teachers and learners alike”. This finding was based on an observed lack of evidence that the portfolio system was widely used, although it was slowly introduced in isolated cases. Teachers reported many practical problems in the implementation of portfolios. The assessment of portfolios was unclear. Without proper assessment, portfolios could merely serve as a means of storage. This finding correlates with the finding in the IDDP Contextual Baseline Survey Report (Strauss, 2002:19). Only 60.7% of Intermediate Phase teachers used portfolios as a type of assessment, whereas all teachers were expected to implement the portfolio assessment system.

Record keeping of learners’ work was rated as 2.6 (cf. Mostert *et al.*, 2002: Table 8, Appendix B). Many records were incomplete, and teachers were unsure of how to record assessment. Teachers also found it difficult to plan for assessment in advance. Peer assessment and self-assessment were not used. Files contained few or no tests and examination papers. This observed evidence reported in the IDDP Curriculum Baseline Survey (cf. Mostert *et al.*, 2002:8) did not correlate with findings from the quantitative data reported in the IDDP Contextual Baseline Survey (Strauss, 2002:18,19). A significant number of the 28 Intermediate Phase teachers (82.1%) responded in the questionnaire that they used self-and peer-assessment. This discrepancy in the findings highlights the probability that teachers intended to apply self and peer-assessment techniques in keeping with OBE, although this application did not happen in practice. Most teachers interviewed expressed the wish for assistance with planning of teaching-learning experiences, including assessment.

Organisation

The IDDP Curriculum Baseline Survey Report (Mostert *et al.*, 2002:10) indicated that some of the educators did not have a learning area file. One teacher's file was used for three learning areas. In some cases, circulars were kept in the office of the principal. Most files observed were incomplete. Educators did not seem aware of any specific structure for their learning area files; they had no index. The organisation of teachers' files was rated as below average at 2.7 (cf. Mostert *et al.*, 2002: Table 7, Appendix B).

Despite attending numerous workshops, teachers still expressed uncertainty about OBE. Some teachers hardly possessed any OBE documentation. The IDDP Curriculum Baseline Report (Mostert *et al.*, 2002:12) concluded that, although teachers were positive about OBE, it was evident that they still lacked confidence in applying OBE principles to their classroom practice. This finding correlates with findings in the IDDP Contextual Baseline Survey Report (Strauss, 2002: 23). Teachers rated their confidence to implement OBE after attending in-service training workshops as below average 46.4% (cf. Strauss, 2002: 23, Table 2.19). Teachers did not appear to have confidence in their own understanding and implementation of OBE, as 72.6% indicated that there should be more courses in OBE in-service training. Only 35.7% of the teachers indicated that they felt they had implemented OBE successfully in their classrooms. The need for intervention programmes that would develop teachers' confidence in the implementation of OBE by developing their planning, learning facilitation and assessment skills became apparent from these findings.

Findings in the Free State Report on Systemic Evaluation in the Foundation Phase (cf. DoE, 2003b) confirmed the findings of the contextual baseline survey report on the education context in the IDDP schools of the Thabo Mofutsanyana District (cf. Strauss, 2002). A major recommendation of the Free State Report on Systemic Evaluation in the Foundation Phase (cf. DoE, 2003: 38 – 40) on the effective implementation of OBE indicated the following. Access to in-service training by all teachers had to be prioritised so that teaching practices could be improved. The report commented that "although educators have received in-service training on OBE, many do not feel confident enough to implement it" (DoE, 2003b:56).

The IDDP Curriculum Baseline Survey Report (Mostert *et al.*, 2002:13) offered the following conclusions on teachers' overall planning and organisation. Teachers were unsure about the planning and implementation of OBE, especially assessment. Planning required a lot of attention. Planning was not systematic or effective, and on the whole reflected a lack of direction. The information provided by the department, as well as

NGOs did not always find its way into practice. The report indicated that teachers had requested assistance with the area of assessment in particular, including continuous assessment.

The following needs of the interviewed Intermediate Phase teachers in their overall planning and organisation of OBE learning experiences were identified:

- the overall development of teachers' knowledge and skills in OBE planning, methodology and assessment;
- the specific development of teachers' ability to meaningfully include skills, attitudes and values in the learning experiences;
- the development of standardised planning formats;
- the development of teachers' skills to apply the Continuous Assessment (CASS) OBE Policy (DoE, 1998) effectively;
- the development of teachers' skills to organise their files; and
- the development of teachers' confidence to implement OBE teaching practices.

Learner output monitoring

Teachers' monitoring of learner output was not directly observable, but this aspect was discussed with them (cf. Observation Sheet 4, Appendix A). The statistical description of learner output monitoring was rated at an average of 3.3 (cf. Mostert *et al.*, 2002: Table 10, Appendix B). However, observers' descriptive evaluations indicated an overall assessment that learner output was inadequate in all respects: quality and quantity, marking, feedback, and corrections.

The IDDP Curriculum Baseline Report (Mostert *et al.*, 2002:13) concluded that learners did not write enough and did not do homework. Teachers attributed the lack of evidence in written homework to the following limiting factors: learners home circumstances, such as a lack of space and electricity; learners using candles, and the lack of parental involvement. Mostert *et al.* (2002:12) expressed reservations about the credibility of the reasons why no evidence of homework was found: "We were not always convinced that these were such major obstacles".

However, the following quantitative data of the IDDP Contextual Baseline Survey Report (Strauss, 2002:3) confirmed the limiting context for learners to do their homework at home. More than 40% of the parents indicated that they had an education lower than Grade 7. Only 29% of the parents had Grade 12 or a higher qualification. Quite a number of learners (45%) indicated they could hardly expect any assistance from their parents with their homework, if and when needed. Learners therefore had to rely quite

heavily on their teachers, elder sisters and brothers, or peers for assistance. Parents indicated that just over half of the households had electricity and running water.

The following needs in learner output and homework were identified during a discussion between observers and teachers:

- the development of the quality and quantity of learner output;
- the development of teachers' skills to monitor learner output effectively; and
- the creation of an enabling context for learners to do their homework.

6.3.2 English Language Learning and Teaching

Learners as well as teachers demonstrated mixed levels of competency and proficiency in the LoLT. The following narrative and statistical descriptions explore this evaluation theme.

Most teachers reported that learners found English difficult, and struggled with it. Observers commented that the home language was also used by learners in their groups. The language of learning and teaching was therefore not practised. Teachers did not seem to be aware that this was, or could be, a problem.

Teachers were not always aware of the importance of concepts in the teaching-learning process. The frequency rating of teachers explaining concepts and terms in English was 3.5 (cf. Mostert *et al.*, 2002: Table 6 – English6, Appendix B). While it was encouraging to note that some teachers paid attention to explain concepts, other teachers did not take the necessary time to ensure that concepts were understood by learners. The IDDP Curriculum Baseline Survey Report (Mostert *et al.*, 2002:8) recommended that teachers should be made aware of concept formation in learners. Teachers sometimes gave learners a group work task without their comprehending the necessary concepts to perform the task.

The importance of code-switching in concept formation was highlighted (Mostert *et al.*, 2002:10). Code switching occurred very little. The frequency count rated only 2.7 (cf. Mostert *et al.*, 2002: Table 6 – English1, Appendix B). When code-switching did occur, it was incidental. Extensive use of code-switching was only observed in one instance.

Observers rated teachers' own usage of English at an average of 3.5 during their lesson presentations (cf. Mostert *et al.*, 2002: Table 6, Appendix B). Teachers were comprehensible, although errors in pronunciation and grammar were observed. Mostert

et al. (2002:10) quoted usage of structures such as a homework, classworks and teachers' use of statal verbs as examples of transfer errors. The following example of teachers' inaccurate pronunciation is quoted, "August was pronounced as Aghast, with learners repeating this pronunciation" (Mostert et al., 2002: 10).

Special mention was made of English language lessons in the IDDP Curriculum Baseline Survey Report (Mostert *et al.*, 2002:9). Observers found that some of the language lessons were very structuralist in orientation, amounting to formal lessons in language usage. The report (Mostert *et al.*, 2002:9) recommended that teachers of English should make use of a more functional and communicative approach. However, the language teachers observed were not familiar with this approach. It was clear that learners were not exposed to enough English in English classes. There were no readers in class. This observed problem could be ascribed to a lack of resources. Mostert *et al.* (2002:9) found that, upon the whole, exposure to English was inadequate.

Findings in the IDDP Contextual Baseline Survey Report (Strauss, 2002:29) confirmed the inadequate exposure to English in the learning and teaching context. Teachers listed the language of learning and teaching and a shortage of materials for use in demonstrations and other exercises as important limiting factors in learner output. In addition, principals indicated the variety of linguistic backgrounds of the learners as an important limiting factor in learner output. The limiting influence of the language of learning and teaching on learner achievement where the LoLT differs from learners' home language was also highlighted as a key finding in the Intermediate Phase Systemic Evaluation Free State Report (FS DoE, 2005:104).

The Intermediate Phase Systemic Evaluation Free State Report (DoE, 2005:104) found that learners taught in a language other than their home language achieved significantly lower scores across all learning areas. This key finding in the Intermediate Phase Systemic Evaluation Free State Report (FS DoE, 2005:104) was ascribed to the "difficulties experienced in communicating and grasping intended meanings". The quoted phrase implied the continued need for strategies in concept transfer from the home language to the language of learning and teaching.

The IDDP Curriculum Baseline Survey Report (Mostert *et al.*, 2002:13) concluded that teachers should become aware of the role of concepts in learning and recommended that they must be empowered to inculcate these in learners. In addition, the report concluded that language teachers were not familiar with communicative language teaching practices.

The following needs in the implementation of English as the LoLT were identified:

- the development of teachers' knowledge and skills to manage learners' mixed levels of competency and proficiency in English as the LoLT;
- the creation of increased learner and teacher exposure to English in the learning and teaching context;
- the development of effective strategies in concept formation;
- the development of effective strategies in concept transfer from the home language to the LoLT;
- the development of English teachers' skills in Communicative Language Teaching; and
- the development of teachers' own English language usage.

6.3.3 *Teacher and Learner Motivation and Attitude towards Learning and Teaching*

The atmosphere and the relationships in the classrooms were regarded as very good and scored an average of 4 on the 5-point rating scale (cf. Mostert *et al.*, 2002: Table 4 – AtRel 1-3, Appendix B). Every teacher spoke in a clear voice, and made good eye contact with learners. Teachers clearly got on well with their learners. In only one instance was there a report that learners were afraid of the educator. Learners generally felt relaxed and free to respond. Teachers' conduct was regarded as very professional and was rated as 4.3 on average (cf. Mostert *et al.*, 2002: Table 4 – Prof 1-3, Appendix B).

Learners seemed enthusiastic and eager to learn in all classes. A few teachers complained about absenteeism and delinquency. There was no reason to doubt their dedication to their roles as educators.

The IDDP Curriculum Baseline Survey Report (Mostert *et al.*, 2002:13) concluded that teachers were generally enthusiastic and dedicated to their profession.

6.3.4 *Management Support to Learning and Teaching*

Data on the learner-educator ratio in the IDDP Contextual Baseline Survey Report (Strauss, 2002:11, Table 2.11) highlighted overcrowding as a limiting feature in the learning and teaching context of the Intermediate Phase classrooms. This feature has already been discussed in Section 6.3.1 of this chapter. Observers noted that some teachers complained about the size of their classes during their interviews. The

provision of sufficient staff and classrooms required managerial support from the School Governing Bodies, the School Management Teams and District Management.

The provision of sufficient and relevant resources for learning and teaching also depended on effective managerial support at school and at district level. The IDDP Curriculum Baseline Survey Report (Mostert *et al.*, 2002:8) indicated that when textbooks were available, there was often only one copy (e.g. an inspection copy). Teachers did not possess a variety of reliable sources, or textbooks. Most teachers complained about a lack of resources at school. The variety and relevance of textbooks, magazines and newspapers, when available, was rated at an average of 2.4 (cf. Mostert *et al.*, 2002: Table 9, Appendix B).

The report (Mostert *et al.*, 2002:12) furthermore indicated that resources were particularly mentioned as a major constraint in planning. One teacher had one copy of a textbook, which she bought herself. It was not clear whether existing resources were utilised in all cases. In most cases learners had no textbooks for themselves. Very few magazines or newspapers were used, if any. This problem led to a lack of variety in the teaching-learning process.

The IDDP Contextual Baseline Report (Strauss, 2002:10) commented that the provision and availability of learning and teaching support material was not managed as effectively as possible. Approximately 60% of the teachers indicated that they had ordered material, but only 35% received the materials and 25% received material other than the material ordered.

In addition, the report (Strauss, 2002:7) indicated that no school had a library. The non-existence of libraries at schools denied learners access to reading material. Strauss (2002:9) reported that the accessibility to reading material was further diminished by the fact that only a small percentage of classrooms (17.9%) had a classroom library or collection of books available. The IDDP Curriculum Baseline Survey Report (Mostert *et al.*, 2002:13) concluded that the lack of resources, lack of adequate source material, and the use of the resources by teachers was problematic. The report (2002:11) noted that the meaningful implementation of portfolios was hampered by the lack of resources.

The report (Mostert *et al.*, 2002:12) found that there was evidence of control by the principal and HOD in only a few instances. The report (Mostert *et al.*, 2002:13) therefore concluded that it was not clear whether control was exercised in all schools.

This apparent lack of effective monitoring and support mechanisms in the four sample IDDP schools was confirmed in the IDDP Contextual Baseline Survey Report (Strauss, 2002:21). Teachers' evaluated principals' management support to professional staff as partially effective (50.0%), frequent monitoring of school activities and learners' progress as partially effective (50.0%) and successful staff development (46.4%) as least effective.

Teachers therefore indicated that they did not receive sufficient support for professional development. The absence of clearly formulated language policies (Strauss, 2002:20) suggested that teachers also needed management support and guidance in using English as the language of learning and teaching.

The frequency and purpose of support visits from district officials to schools were also relevant to the evaluation theme of management support to learning and teaching. The district provided the closest level of support to the IDDP schools.

The IDDP Contextual Baseline Survey Report (Strauss, 2002:26, Table 2.24) provides the following statistics about the purpose and the average frequency visits by departmental officials.

Principals indicated that support visits focused mainly on administrative issues and not on the professional development of the School Management Teams and teachers. The frequency rate of support visits by district officials to provide circulars was indicated as between 4 to 5 visits per year (4.5). However, the frequency of district support visits to provide guidance to teachers/principals on Curriculum 2005 was rated at 1 visit per year. The frequency of district support visits to organise training for teachers on Curriculum 2005 was rated at less than 1 visit per year (0.8). The frequency rate of district visits per year to conduct classroom observation (0.5) and to monitor assessment practices (0.3) decreased even further. Evidence from the above data pointed to a lack of district support to the professional development of Intermediate Phase teachers in the implementation of OBE in the classroom.

The following needs in the provisioning of management support to the implementation of English as the LoLT were identified:

- decrease the learner/teacher ratio
- the development of the School Management Team (SMT) and of the procurement district officials to manage the provisioning of learning and teaching support material effectively;

- the provisioning of libraries and the improvement of security;
- the development of SMTs, and district officials to provide effective monitoring and support mechanisms for the professional development of teachers; and
- increased opportunities to provide in-service training to teachers for improved teaching practices.

6.3.5 The Role and Status of English in the Project Schools

The Language-in-Education Policy (cf. DoE, 1997) provides guidelines on the implementation of the language of learning and teaching in schools. Free State curriculum guidelines offer guidance to School Governing Bodies on the choice and implementation of the language of learning and teaching in their schools (see FS DoE, 2004a:1-2 as an example).

English was identified by the School Governing Bodies (SGBs) as the language of learning and teaching in all four sample schools. However, the IDDP Contextual Baseline Survey Report (Strauss, 2002:20) indicated that language and admission policies were not formulated in all of these schools. The fact that language policies with clear support plans for learners were not in place suggested a need for learner support in using English as the language of learning. The Intermediate Phase Systemic Evaluation Free State Report (FS DoE, 2005:111) furthermore recommended a renewed public focus on development programmes and on language-in-education policy matters.

The following needs regarding the role and status of English in the project schools were identified:

- the formulation of clear guidelines in the implementation of English as the LoLT to support teachers and learners; and
- the development of a practical intervention programme to support the effective implementation of English as the LoLT.

6.3.6 The Role and Status of Intermediate Phase Teachers in Curriculum Decisions

The reported (Mostert *et al.*, 2002:12) lack of teachers' confidence in their own abilities to implement the OBE curriculum resulted in the underestimation of their significant role in curriculum decisions. Their diminished role in shaping the curriculum in line with the local learning context became evident from their lack of confidence in planning together. The Curriculum Baseline Survey Report (Mostert *et al.*, 2002:10) noted that teachers

reported that, in most cases, they worked alone. They did not do planning as part of a team. Teachers therefore had no formal status to meet as professional working groups where they could create forums to provide officially acknowledged inputs in curriculum decisions.

The following needs in the role and status of Intermediate Phase teachers in curriculum decisions were identified:

- the development of formalised structures for the professional development of Intermediate Phase teachers within and across schools in the same geographical area to make informed curriculum decisions;
- the development of teachers' confidence to take responsibility for their own curriculum decisions and teaching practices.

6.3.7 The Role and Status of English in the Phuthaditjhaba Community

Data offered in the Contextual Baseline Report (Strauss, 2002: 3-4) provided evidence that English did not play a major role in the day-to-day lives of the community. Strauss (2002:3) reported that learners' parents or guardians were mainly SeSotho speakers, only 12% spoke IsiZulu. Strauss (2002:4) reported that the majority of parents and learners (75%) had radios. Subsequent enquiries by the evaluator about the language which the community listened to indicated that they mostly listened to radio broadcasts in their home language. In addition, teachers were seemingly unconcerned about the fact that learners reverted to their home language in group discussions (Mostert et al., 2002:7). Teachers were not aware that they pronounced *August* inaccurately as *Aghast*. The common mispronunciation of the name of a month, which forms part of the basic vocabulary in any language, indicated the limited significance of English in ordinary conversation. This evidence pointed to a limited exposure to English in the community and consequently confirmed the minor role of English in daily communication.

However, the major status of English to provide academic and economic opportunities for community development became evident from the fact that the parents had not only chosen English as the language of learning of teaching in the four sample IDDP schools, but in all ten IDDP schools. The major status which the Phuthaditjhaba community had assigned to English as an academic language and the minor role of English as an everyday communication vehicle created a gap between the ideal expectations of English and the actual usage of English as the language of learning and teaching. The limited exposure to English in the community impacted negatively on learners' and teachers' ability to communicate in English.

The following needs in the role and status of English in the Phuthaditjhaba community were identified:

- the creation of opportunities for learners and teachers to use English in their everyday conversations at school and at home;
- the promotion of increased exposure to English as a means of daily communication in the community, especially encouraging learners, teachers and their parents or guardians to listen to English broadcasts, watch English programmes on television, and read English newspapers, magazines, and books.

6.3.8 A Summary of the Intermediate Phase Teachers' Needs identified according to Evaluation Themes in the English as LoLT Case Study

A summary of the twenty six Intermediate Phase teachers' needs identified during the descriptive evaluation of the English as LoLT Course as a case study is presented in Table 3. The presentation of the summary follows the seven evaluation themes identified for the needs assessment phase.

Table 3: Summary of the Intermediate Phase Teachers' Needs Identified According to the Seven Evaluation Themes of the Needs Assessment Phase in the English as LoLT Case Study

EVALUATION THEME	NEEDS IDENTIFIED	
1. Tension between policies on Outcomes-based Education (OBE) and classroom practice	<p>1.1 Planning of a learning experience:</p> <ul style="list-style-type: none"> • simplification of the planning format; • clarification of outcomes, values and attitudes; • clarification of OBE terminology; • the formulation of appropriate specific outcomes that are relevant to the context and to the learners. <p>Presentation of a learning experience</p> <ul style="list-style-type: none"> • the development of teachers' knowledge and skills to increase the variation of interaction patterns; • the development of teachers' planning and facilitation skills to manage group work effectively to promote active learner participation in collaborative learning; • the need to ensure varied types of learner participation though pair, class, and individual work in addition to group work; • the need to introduce content variety through proper lesson planning and 	<p>1.3 Overall planning and organisation of OBE learning experiences:</p> <ul style="list-style-type: none"> • the overall development of teachers' knowledge and skills in OBE planning, methodology and assessment; • the specific development of teachers' ability to meaningfully include skills, attitudes and values in the learning experiences; • the development of standardised planning formats; • the development of teachers' skills to apply the Continuous Assessment (CASS) OBE Policy (DoE, 1998) effectively; • the development of teachers' skills to organise their files; • the development of

EVALUATION THEME	NEEDS IDENTIFIED	
	<p>effective pacing of the learning experience;</p> <ul style="list-style-type: none"> • Development of teachers' skills to use resources effectively; • the development of teachers' skills to pace the learning experience judiciously to ensure the effective use of contact time; • the development of teachers' knowledge and skills in the assessment and recording of learner performance during the learning experience. 	<p>teachers' confidence to implement OBE teaching practices.</p> <p>1.4 Learner output and homework:</p> <ul style="list-style-type: none"> • the development of the quality and quantity of learner output; • the development of teachers' skills to monitor learner output effectively; • the creation of an enabling context for learners to do their homework.
2. English Language Learning and Teaching	<ul style="list-style-type: none"> • the creation of increased learner and teacher exposure to English in learning and teaching contexts; • the development of effective strategies in concept formation; • the development of effective strategies in concept transfer from the home language to the LoLT; • the development of English teachers' skills in Communicative Language Teaching; • the development of teachers' own English language usage. 	
3. Teacher and learner motivation and attitude towards learning and teaching	Positive motivation and attitude needs to be sustained.	
4. Management support to the implementation of English as the LoLT	<ul style="list-style-type: none"> • decrease in the learner/teacher ratio • the development of the School Management Team (SMT) and of the procurement district officials to manage the provisioning of learning and teaching support material effectively; • the provisioning of libraries and the improvement of security; • the development of SMTs, and district officials to provide effective monitoring and support mechanisms for the professional development of teachers; • increased opportunities to provide in-service training to teachers for improved teaching practices. 	
5. The role and status of English in the project schools	<ul style="list-style-type: none"> • the formulation of clear guidelines for the implementation of English as the LoLT to support teachers and learners; • the development of a practical intervention programme to support the effective implementation of English as the LoLT. 	
6. The role and status of the Intermediate Phase teachers in curriculum decisions	<ul style="list-style-type: none"> • the development of formalised structures for the professional development of Intermediate Phase teachers within and across schools in the same geographical area to make informed curriculum decisions; • the development of teachers' confidence to take responsibility for their own curriculum decisions and teaching practices. 	
7. The role and status of English in the Phuthaditjhaba community	<ul style="list-style-type: none"> • the creation of opportunities for learners and teachers to use English in their everyday conversations at school and at home; • the promotion of increased exposure to English as a means of daily communication in the community, especially encouraging learners, teachers, and their parents or guardians to listen to English broadcasts, watch English programmes on television, and read English newspapers, magazines and books. 	

An analysis of the needs assessment summary (cf. Table 3) confirms the interrelatedness of the curriculum and the learning milieu at all levels of the evaluation context (Parlett & Hamilton, 1975:147).

It became apparent that a number of intervention programmes were required to address the whole spectrum of needs presented in the summary. An intervention programme for School Management Teams on instructional leadership was, for example, identified to complement and support curriculum delivery in the classrooms. A language intervention programme had to be designed in response to the Intermediate Phase teachers' needs in using English as the LoLT in the four IDDP schools.

The summary of teachers' needs according to the evaluation themes highlighted the importance of an integrated approach to the curriculum and learning milieu needs of this particular education context for evaluation, especially in the design of the English as LoLT Course. An improved understanding of the OBE curriculum policies could, for example, lead to better planning, presentation and assessment skills. Teachers' confidence to share their planning and to make informed curriculum decisions could then formally be acknowledged.

In addition, the overall development of teachers' skills to facilitate learning experiences could inform their specific skills to manage English as the LoLT effectively. Teachers' own English language usage could also develop through increased exposure to, and knowledge of, academic and informal language usage. Teachers would also be able to define and express their resource material and training needs to the School Management Team and district officials more precisely and confidently.

The following section presents an evaluation of Lynch's (1996:4) CAM to facilitate a valid needs assessment phase in the English as LoLT Course case study.

6.4 An Evaluation of the Context Adaptive Model Applied to the Assessment Phase of the Case Study

The ability of Lynch's (1996:4) CAM to guide a valid needs assessment of the English as LoLT Course is described according to the core criteria of flexibility, appropriateness, clarity of description and clarity of logic (cf. Chapter 2, Section 2.5.3.5). Reflexive comments on the effectiveness of this guidance to produce a convincing descriptive evaluation of the Intermediate Phase teachers' needs are presented. Reflexive comments on the usefulness and relevance of the needs assessment conclude the meta-evaluation section.

6.4.1 Flexibility

Lynch's (1996:4) CAM offers a range of data collection and analysis instruments and procedures. As previously mentioned (Chapter 5, Section 5.5.1), the flexibility of this language programme evaluation model lies in its promotion of quantitative and qualitative data collection and analysis methods. The model further includes guidelines on mixed evaluation designs (Lynch, 2003:27-29). In addition, the model promotes the creation of a rich set of information consisting of quantitative and qualitative data from various databases (Lynch, 2003:28).

These guidelines were used to include data from existing resources (cf. Section 6.2.2; Chapter 5, Section 5.4.1.1) in the needs assessment phase of the English as LoLT Course case study. Data from existing baseline surveys (cf. DoE, 2003b; FS DoE, 2005) were used to strengthen the primary audiences' confidence in the needs identified for the English as LoLT intervention programme.

The flexibility of Lynch's (1996:4) CAM contributed to the persuasiveness of the evaluation arguments where the weight of the evidence suggested one interpretation to the exclusion of others. Quantitative data from the IDDP Contextual Baseline Report (Strauss, 2002:19) supported, for example, the conclusion that "class time was not effectively utilised." (IDDP Curriculum Baseline Survey Report, 2002:7). This conclusion was based on the combined weight of observers' qualitative, narrative evidence on the lack of lesson pacing and on quantitative statistics from the IDDP contextual survey (cf. Strauss, 2002:19). According to these statistics (cf. Strauss, 2002:19), teachers did not seem to view the actual facilitation of a learning experience as an important activity during formal teaching time. The quantitative and qualitative evidence from two separate IDDP baseline survey sources (cf. Section 6.3.1) outweighed the rating of lesson pacing in the IDDP curriculum baseline survey as average (3.3) (cf. Mostert *et al.*, 2002: Table 2 – Pres10a, Appendix B).

Lynch's (1996:4) CAM consequently facilitated the persuasiveness and usefulness of this needs analysis to design a programme that would develop the Intermediate Phase teachers' skills in lesson planning with an emphasis on pacing. This validation is informed by the following evaluation standards and criteria: the interpretivist evaluation standards of persuasiveness and usefulness (Leedy & Ormrod, 2001:165); the criterion of usefulness in utilitarian pragmatism (cf. Table 1) and the evaluation standard of utility (Stufflebeam, 2001).

6.4.2 Appropriateness

The appropriateness or relevance (cf. Chapter 2, Section 2.5.3.2) of the guidelines in Lynch (cf. 1996; 2003) to assure the quality of the data collection instruments and procedures is described in this section. The relevance of these guidelines to increase the internal reliability and the internal validity of the IDDP curriculum baseline survey and the descriptive evaluation of the needs assessment phase in this case study is analysed.

Internal reliability

Nunan (1993:14) defines *internal reliability* as the consistency of data collection, analysis, and interpretation. The design of the observation sheets as schedules (cf. Appendix A) reflect Lynch's (2003:72) emphasis on a highly structured observation approach to increase the reliability of performances observed in real time.

Observation Sheet 1 (cf. Appendix A) provides an example of a schedule for observing a learning experience from the beginning to the end of a period. The observation sheet consists of short and concise descriptors to refer to when making the required judgements. The schedule is divided into major categories consisting of: written preparation, presentation, atmosphere and relationships, learner experience, resources, professionalism, and use and usage of the English language. The schedule elicited a sufficient amount of detail considering the duration of the observation period. Lesson periods were 45 minutes.

In addition, Observation Sheet 1 (cf. Appendix A) provides opportunities for observers' comments or field notes at the end of each category. Space for narrative comments is also provided at the end of Observation Sheets 2 – 4 (cf. Appendix A). The formats of the four observation sheets strengthen the twofold purpose of the instruments to collect quantitative and qualitative data concurrently. The analysis of the quantitative and qualitative data collected in Observation Sheet 1 (cf. Appendix A) mostly yielded consistent findings that increased the internal reliability of the baseline survey.

According to Brown (cited in Lynch, 2003:71), the 5-point Likert rating scale encourages "the tendency of some participants to choose the middle point, rather than declaring a clear position". The following example from the IDDP Curriculum Baseline Survey Report (cf. Mostert *et al.*, 2002:9) confirms this tendency.

Learner experience of interaction patterns was rated as average at 3.5 (Mostert *et al.*, 2002: Table 5, Appendix B). This neutral descriptive statistical assessment did not correlate with observers' qualitative identification of learner experience in group

interaction as problematic (cf. Section 6.3.1). Observers (Mostert *et al.*, 2002:9) commented that interaction patterns were mostly dominated by teachers, despite the use of group work. Brown (cited in Lynch, 2001:41) recommends using an even number of scale points to avoid the tendency for some to choose a neutral middle ground which could affect the reliability of the observation.

The application of a 4-point Likert rating scale, as suggested in Lynch (2003:71), would have increased the internal reliability of the quantitative data collected during the classroom observations, interviews and documentary analysis.

Lynch (cf. 1996; 2003) provides guidelines to increase the internal reliability of the data collection instruments and procedures. However, he does not provide detail on how to control the internal reliability of data collection procedures operationally. Mackey and Gass (2005:358) define interrater reliability as “consistency between two or more raters”. The pairs of observers discussed the scores after each lesson observation of the twenty-six Intermediate Phase teachers in the four IDDP schools. They then averaged their ratings. McNamara (1996:117) indicates that the practice of averaging ratings is a common practice to ensure fairness and reliability. The use of an observation team of at least two raters per class controlled the interrater reliability of the observation scales operationally (cf. Section 6.2.6.2).

The internal reliability of the data collection procedures in the IDDP curriculum baseline survey was furthermore increased operationally through a benchmarking session of two and a half hours prior to data collection (cf. Section 4.2). The purpose of this session was to ensure consistency of interpretation and to reach consensus about the interpretation of the terminology in the observation questionnaire. The observers' inputs from various perspectives led to refinements in the observation questionnaire. Feedback sessions held at the end of each day created regular opportunities to discuss problems that occurred during the observation. The consistency of the observations was assured and ensured during these feedback sessions.

Internal validity

Greene (2000:984) views the case study as a preferred method of the interpretivist approach to language programme evaluation. Lynch (1996: 53 – 69; 2003: 156-7) provides detailed discussions on validity from an interpretivist perspective.

Validity, viewed from an interpretivist perspective, is associated with trustworthiness (cf. Chapter 2, Section 2.5.2.2). Lynch (1996:56-7) provides an extensive list of techniques

to increase the validity of the evaluation findings. The list describes the techniques as a means of verification for the four criteria of trustworthiness: credibility, transferability, dependability, and conformability.

Triangulation deserves special mention as a technique to increase the credibility or internal validity (cf. Lynch, 2003:157) of the mixed methods evaluation findings in qualitative research (Patton, 1990:186-188) and in case studies (Stake, 2005:453). Lynch (1996:59-62) devotes a separate section to the discussion of this technique. Lynch (1996:59) defines triangulation as “the gathering and reconciling of data from several sources and/or from different data gathering techniques”. He also includes triangulation among different persons who have collected the data in the definition. This inclusion tallies with Stake’s (2005:454) definition of triangulation as “a process of using multiple perceptions to clarify meaning, verifying the repeatability of an observation or interpretation”.

The evaluation team that conducted the IDDP curriculum baseline survey consisted of university staff, departmental officials, and non-governmental education consultants. The observers therefore represented three different perspectives on teaching and learning. The evaluation team was divided into two teams who visited the four targeted IDDP schools over a period of four days. The composition of these teams included one observer from each perspective.

The credibility of the baseline survey was further increased through the collection and analysis of data from different data collection techniques. The observation questionnaire (cf. Appendix A) provides evidence of observation, interviewing and documentary analysis to increase the credibility or internal validity of this case study.

In addition, the mixed evaluation design of the needs assessment phase in the case study allows the descriptive evaluations to comply with a core evaluation criterion for qualitative research, namely coherence (Leedy & Ormrod, 2003:165). The data mostly yielded consistent findings (cf. Section 6.3). A portrait of the identified needs that ‘hang together’ could therefore be presented (cf. Section 6.3.8; Table 3).

The interpretivist criterion of coherence promotes triangulation in requiring multiple data sources that converge onto consistent conclusions. Multiple data sources from the IDDP contextual and curriculum baseline surveys, as well as the provincial systemic evaluations, mostly converged into consistent conclusions. The interpretivist evaluation criterion of coherence also requires that contradictions within the data are recorded.

These contradictions are recorded in the descriptive evaluation of the needs assessment phase (cf. Section 6.3.1) and are discussed in the previous section (cf. Section 6.4.2) as well as in this meta-evaluation section. The descriptive evaluation consequently complies with the interpretivist criterion of coherence (Leedy & Ormrod, 2001:165).

The extent to which the guidelines of the context adaptive model (cf. Lynch, 1996; 2003) facilitated the validity and reliability of the needs assessment depends on their clarity of meaning.

6.4.3 *Clarity of Description*

Lynch (2003:41-75;76-117) devotes an entire chapter to offer detailed examples of developing quantitative or measurement data collection procedures and a chapter to explain their data analysis. Lynch (2003:118-133; 134-147) likewise devotes one chapter to describe the development of qualitative or interpretivist data collection procedures and a chapter to explain the data analysis of these instruments.

Lynch (cf.1996, 2003) provides clear descriptions and vignettes of quantitative data collections and analyses in positivist evaluation designs (2003:22-25) and of qualitative data collections and analyses in interpretivist evaluation designs (2003:25-27). An entire chapter (Lynch, 2003:148-165) is also devoted to the discussion of validity from a positivist and from an interpretivist perspective. The descriptions of language programme evaluation in Lynch (cf. 1996) exceed, in some instances, the detail provided in Lynch (cf. 2003). However, while Lynch (2003) uses the detail of his previous book (1996) as a source of reference, the latter book provides more current discussions and examples of language assessment and programme evaluation.

Lynch (2003:69) and Mackey and Gass (2005:117-9) emphasise the importance of providing clear instructions in the data collection instruments. Lynch (2003:68) highlights the fact that survey questions should have a clear use for the data required. The data should be relevant to the goals and interests of the evaluation to increase the internal validity of the evaluation. According to Mackey and Gass (2005:118), the instructions and questions should be appropriate to the level of linguistic and cultural knowledge of the respondents, especially in second language research. Attention to clarity of description in the formulation of data collection instruments increases their internal validity (Mackey & Gass, 2005:118; Lynch, 69-70). The questions in the observation questionnaire of the curriculum baseline survey were clearly formulated and appropriate to the level of the participants (cf. Appendix A).

However, Lynch (cf. 1996; 2003) does not devote much space or attention to clarifying report writing in language programme evaluation. Lynch (cf. 2003) constantly refers to the presentation of convincing arguments to multiple evaluation audiences as the final outcome of carefully selected evaluation designs. Yet, Lynch (cf. 1996; 2003) does not include vignettes of language programme evaluation reports that clearly illustrate how the first six steps culminate in evaluation reports in response to the evaluation goals formulated in the first step of his model.

The following sub-section analyses the ability of the first six steps in Lynch's (1996:4) CAM to promote the credibility of the findings in the needs assessment phase of the English as LoLT Case study through an emphasis on the internal logic of the evaluation process.

6.4.4 *Clarity of Logic*

The descriptive evaluation of the needs assessment phase could respond to the evaluation goals of the primary evaluation audiences as a result of the emphasis placed on the identification of the evaluation audiences in the first step of Lynch's (2003:15-17) context adaptive model.

The multiple interests of the primary evaluation audiences were represented in the evaluation teams and participants of the IDDP curriculum and contextual baseline surveys. These interests ranged from accountability for the quality of the needs assessment, to the curriculum development of the English as LoLT Course informed by the needs assessment, to teacher self-development resulting from the needs expressed in the baseline surveys.

The summative goal of the English as LoLT needs assessment phase was to make informed decisions about the design and implementation of an appropriate language intervention programme. The formative evaluation goal was to design and implement a language intervention programme that would further develop the Intermediate Phase teachers' knowledge and skills in using English as the LoLT in the context of OBE.

Lynch (2003:17-19) promotes the clarification of the evaluation context (Steps 2) in his context adaptive model. The evaluation teams, target population, timeframes and process of the English as LoLT Course evaluation was negotiated with the primary evaluation audience. This process was formally documented in the IDDP proposal, plans and reports.

The examples of major issues that could emerge from an evaluation context provided in Lynch (2003:19-20) assisted the identification of preliminary evaluation themes (Step 3) in the English as LoLT Course evaluation context. The data in the descriptive evaluation of the assessment phase are presented according to themes that reflect the essential features of the English as LoLT evaluation context. The tension between OBE policies and classroom practice and English language learning and teaching are, for example, two themes of the descriptive evaluation.

Evaluation arguments presented according to the evaluation themes ensure that the assessment phase of the English as LoLT Course evaluation complies with the qualitative evaluation research criterion of completeness (Leedy & Ormrod, 2003: 15). The descriptive evaluation is able to provide the primary evaluation audiences with a complex picture of the evaluation context which includes, for example, the teachers' and learners' attitudes and motivation towards learning and teaching, their interaction patterns and their use of English as the LoLT. The descriptive evaluation is therefore able to provide the evaluation audiences with a total, multifaceted picture (i.e. a thick description) of the needs identified for learning and teaching in the case study.

Lynch (cf. 1996; 2003) provides detailed discussions on the selection of an approach and design (Step 4) for the English as LoLT programme evaluation as a whole, which includes the needs assessment phase under discussion. Lynch (cf. 1996; 2003) provides detailed guidelines on data collection (Step 5) and data analysis (Step 6). The descriptive evaluation of the needs assessment used a rich, quantitative and qualitative database for the presentation of the identified needs. The needs analysis could furthermore comply with the evaluation criterion of rigour (Leedy & Ormrod, 2003: 165) in qualitative research. The detailed descriptions (cf. Lynch, 1996; 2003) provided rigorous, precise and thorough methods to collect, record and analyse data.

The effectiveness of the guidelines offered in Lynch (cf.1996; 2003) ultimately links with the ability of the descriptive evaluation to present convincing evaluation arguments of the Intermediate Phase teachers' needs. A summary presented according to the seven identified evaluation themes articulated the findings of the needs assessment (cf. Section 6.3.8; Table 3). This summary informed the development of a focused language intervention programme.

Lynch (2003:157) promotes clarity of logic and description to increase the internal validity of an evaluation. He comments as follows on the use of interpretivist validity criteria: "it is not a question of how many of the criteria have been met, or how many

techniques for meeting these criteria that you use, but the degree to which the criteria you discuss build a convincing argument for the credibility and trustworthiness of your findings". Lynch (2003:157) further comments that interpretivist validity involves "clarity and thoroughness in using, and reporting your use of, the techniques that enhance validity".

Lynch (1996: 9) highlights the importance of sensitivity to the audience and goal as a prerequisite to producing a useful final report (Step 7). The writer as project manager shared the results of the needs analysis with the four IDDP schools and with the Thabo Mofutsanyana District in PowerPoint format in October 2002 (cf. Mostert *et al*, 2002: Appendix C). The writer shared these results with the four sample schools and with the relevant district officials to ensure their continued accountability toward curriculum and teacher development in supporting the implementation of the language intervention programme in 2003. The detailed reports were shared with relevant officials from the Free State Department of Education, the Flemish representative of the Flemish Government and with the SHC R&D consultants responsible for the development of the English as LoLT Course. The detailed report to the strategic partners also included a financial report on the cost-effectiveness of the needs analysis.

The evaluation therefore complied with the evaluation standards of propriety (Beretta, 1992:18, Stufflebeam, 2001). The reports complied with the following specific checkpoints for propriety in Stufflebeam's (1999) meta-evaluation checklist: disclosure of findings to the right-to-know audiences; assurance that reports reach their audiences; inclusion of an expenditure summary in the report as part of the fiscal responsibility of the evaluation.

6.4.5 Reflexive Comments

The above analysis (cf. 6.4.1-4) has mainly focused on the promotion of the credibility or internal validity, as well as on the internal reliability of the needs assessment phase in the English as LoLT Course case study.

The following comments reflect on threats to the internal validity and reliability of the assessment phase in the course evaluation. The most important threat to the internal reliability of the observation questionnaire (cf. Appendix A) was caused by the lack of time to pilot the data collection instrument. Palmer (1992:165) refers to the lack of time to pre-test evaluation instruments as a *real-world problem*. Alderson and Beretta's (1992:140) postscript to Mitchell's evaluation study comments that the narrative description provides a "good account of the need for time and resources to develop, trial

and amend the special instruments that may be required by an evaluation study". Although the English as LoLT Course evaluation was a longitudinal study, the timeframe for a needs assessment was limited to a period of four months to develop, conduct and report on the needs of the Intermediate Phase teachers in the four IDDP schools.

As previously mentioned (6.4.2), the use of a 4-point Likert scale (Lynch, 2003:71) could have increased the internal reliability of the observation schedules (cf. Appendix A). In addition, Observation Schedule 1 (cf. Appendix A) could have provided a space to record the time that the activities took. Lynch (2003:74) provides an example of an observation schedule that promotes the detailed recording of time to establish the sequence of language classroom behaviours.

However, the question remains whether the format of the observation schedule provided in Lynch (2003:74) would have provided useful data for the purpose of the baseline survey in the English as LoLT Course evaluation (Beretta, 1992:164). Observation Sheet 1 (Appendix A) includes a question on pacing (Question 10) and on timing (Question 13), in addition to providing space for narrative reporting on the quality of the lesson presentation. The quantitative and qualitative data gathered from these questions provided useful information on lesson pacing for designing a language intervention programme.

Palmer (1992:160) reflects on the value of gathering data in different ways for the same purpose, even if the data were useful. He concludes by commenting that "had we spent less time gathering the same kind of information by means of different methods and less time gathering data not related to our basic research question, we could have spent more time refining our primary instruments".

This reflection leads to the challenge of balancing internal validity and reliability in a language programme evaluation. The use of different methods for the collection of quantitative and qualitative data is promoted through triangulation to increase the internal validity of interpretivist research (Lynch, 1996:67). However, the availability of time and expertise to collect and analyse the amount of data could jeopardise the reliability of the findings. On the other hand, the credibility of findings could be questioned if the data collection instruments and procedures were not reliable.

The multiple data sources and perspectives included in the needs assessment phase of the English as LoLT Course evaluation contributed to the credibility of the Intermediate Phase teachers' identified needs. The internal reliability of the observation questionnaire

could have increased during a piloting phase. However, the increased validity of the survey findings through triangulation counter-balanced the threat to the internal reliability caused by the lack of time to pilot the data collection instrument.

Alderson and Beretta (1992:299) highlight the importance of reflexive comments on the usefulness and relevance of language programme evaluations. This section concludes with a reflection on the usefulness of the needs assessment phase in this case study.

The assessment phase was useful in providing a baseline to determine the impact of the language intervention programme on the Intermediate Phase teachers of the four IDDP schools who participated in the language programme. As previously mentioned (6.2.6), a needs analysis provides the means of establishing the effectiveness of a course (Hyland, 2006:73). Stufflebeam's context, input, process and product (CIPP) model (cited in Nunan, 1993:195) expresses the relevance of context evaluation to plan for needed changes and to provide a basis for judging outcomes.

The ultimate usefulness of the needs assessment phase lay in its relevance to inform the design of the English as LoLT Course. The summary of the Intermediate Phase teachers' needs in the four IDDP schools (cf. 6.3.8) provided detailed guidelines to design a focused language programme intervention.

6.5 Conclusion

This chapter has described the assessment phase in the English as LoLT Course case study (cf. Figure 3). The description of this programme evaluation moved from an exploration of the broader education and evaluation context of this study (Stage 1a) to the identification of the Intermediate Phase teachers' needs (Stage 1b) in the IDDP curriculum survey (cf. Mostert *et al.*, 2002). A descriptive evaluation was presented according to the seven themes of the assessment phase.

The meta-evaluation section presented an analysis of Lynch's (1996:4) CAM to guide a valid needs assessment for the design of the English as LoLT Course. Reflexive comments on the internal validity and reliability of the needs assessment and its usefulness were presented.

The usefulness and relevance of the needs assessment phase in the English as LoLT Course case study can, however, only become evident in the response of the language programme design and implementation to the identified needs of the Intermediate Phase teachers in the four IDDP schools. A description, evaluation and meta-evaluation of the implementation phase in the English as LoLT Course case study follows in Chapters 7 and 8.

The next programme evaluation stages (cf. Figure 3) are presented in Chapters 7 and 8. The second programme evaluation stage verifies the language programme design (Stage 2a) and the appropriateness of the programme scope and level (Stage 2b) in Chapter 7. The monitoring of the programme implementation phase (Stage 3) is also described in Chapter 7. The response of the English as LoLT Course (Stage 4) to the teachers' needs established in the needs assessment phase is evaluated in Chapter 8. In addition, an evaluation of Lynch's (1996:4) CAM to enable a valid evaluation of the implementation phase in the English as LoLT Course case study is presented in the meta-evaluation section of Chapter 8.

CHAPTER 7

PHASE TWO: ASSESSMENT OF THE ENGLISH AS LoLT COURSE IMPLEMENTATION PHASE

7.1 Introduction

The second phase in the evaluation of the English as LoLT Course as a case study describes and evaluates the development and monitoring of the language programme (cf. Chapter 1, Section 1.5; Chapter 5, Section 5.4.2). In addition, the effectiveness of Lynch's (1996:4) CAM to enable a valid evaluation is analysed. This study presents the second phase in two parts. The first part is presented in this chapter and the second part follows in Chapter 8.

This chapter describes the verification (cf. Figure 3, Stages 2a,b) and monitoring (cf. Figure 3, Stage 3) of the English as LoLT Course curriculum in response to the Intermediate Phase teachers' identified needs (cf. Chapter 6, Section 6.2.7.2). Chapter 8 evaluates the response of the language programme to this needs analysis. The meta-evaluation section of Chapter 8 analyses the effectiveness of Lynch's (1996) CAM to validate the evaluation of the English as LoLT Course implementation phase.

The first section of this chapter outlines the purpose and design of the second evaluation phase in the English as LoLT Course as a case study. Section two describes the second language programme evaluation stage (cf. Figure 3). This stage describes the verification of the language programme design (Stage 2a) and the appropriateness of its scope and level (Stage 2b) in relation to the Intermediate Phase teachers' curriculum needs. These needs were identified in the needs assessment phase (Stage 1b). Section three describes the third evaluation phase in this case study, namely the monitoring process of the language programme (Stage 3).

The purpose of the Programme Implementation Phase in the English as LoLT Course case study is described in the following section.

7.2 The Purpose of the Programme Implementation Phase in the English as LoLT Course Evaluation

7.2.1 Purpose

The purpose of this phase was to verify the appropriateness of the English as LoLT Course design, scope and level (Stages 2a,b) and to monitor (Stage 3) the implementation of the programme (cf. Figure 3). This purpose involved a continuous evaluation process of the extent to which the Intermediate Phase teachers' curriculum needs identified in the first phase were addressed in the development and

implementation of the English as LoLT Course. The evaluation goal of this phase was therefore formative.

The focus on continuous evaluation corresponds with the emphasis on continued enquiry in the second phase of the illuminative evaluation strategy (Parlett & Hamilton, 1975:148). "The second phase of this strategy aims to build a convincing database through further and sustained enquiry into the selected phenomena" (Parlett & Hamilton, 1975:148). In the case of the current language programme evaluation, the *selected phenomena* refer to the Intermediate Phase teachers' needs identified for the English as LoLT Course during the first assessment phase of the evaluation (cf. Table 3).

The emphasis on continuous evaluation in the second phase of this case study determined its evaluation design.

7.2.2 The Evaluation Design

The second phase of the English as LoLT Course used a mixed evaluation design to assess the implementation process. The mixed design created an opportunity to collect and analyse qualitative and quantitative data in order to provide a convincing descriptive evaluation of the English as LoLT implementation.

The mixed evaluation design involved several rounds of consecutive assessments. The evaluation design included the sequential data collection procedure of the Mixed Method Design (Creswell, 2003). The evaluation design allowed for predominantly qualitative data collection and analysis procedures as part of the overall interpretivist evaluation design of this case study.

The evaluation took place over a period of two years. The second language programme evaluation (Stages 2a,b) covered a period of six months from October 2002 to March 2003. Two evaluability assessments were conducted during this period. As previously mentioned (cf. Chapter 5, Section 5.4.2.1), Rossi and Freeman (cited in De Vos, 2001:380) describe evaluability assessments as successive rounds of qualitative data collection with programme staff. These assessments are used to broaden evaluators' knowledge, verify information, and to test alternative programme options.

The qualitative and quantitative data collected and analysed during programme monitoring assessments covered a period of 18 months from April 2003 to September 2004. The evaluability assessments in the English as LoLT Course implementation process are described in the next section.

7.3 Evaluability Assessments of the English as LoLT Course Design

Two successive rounds of evaluability assessments (cf. Chapter 5, Section 5.4.2.1) took place during this phase. The purpose, data collection and analysis procedures, as well as the findings of each evaluability assessment, are described separately in the following sub-sections.

7.3.1 Programme Evaluation Stage 2a: Evaluability Assessment One

7.3.1.1 Purpose

The purpose of the first evaluability assessment in the English as LoLT Course was to verify that the identified needs of the Intermediate Phase teachers in the four IDDP schools (cf. Table 3) informed the focus areas of the language programme.

7.3.1.2 Participants

The following primary level stakeholders in the English as LoLT Course evaluation took part in the first evaluability assessment (cf. Chapter 3, Section 3.2.1.1):

- the writer as IDDP Project Manager, as evaluator and as researcher;
- the two professors from the School of Languages from the North-West University (Potchefstroom Campus) responsible for external quality assurance of the language programme
- the SHC R&D implementation team responsible for the design, implementation and assessment of the language programme.

7.3.1.3 Data Collection

The writer as IDDP Project Manager and researcher led a brainstorming session and took field notes there. The writer therefore participated in this session as a participant observer. Participants in the brainstorming session formed the evaluation team for the first evaluative assessment. This assessment took place on 22 October 2002.

7.3.1.4 Data Analysis

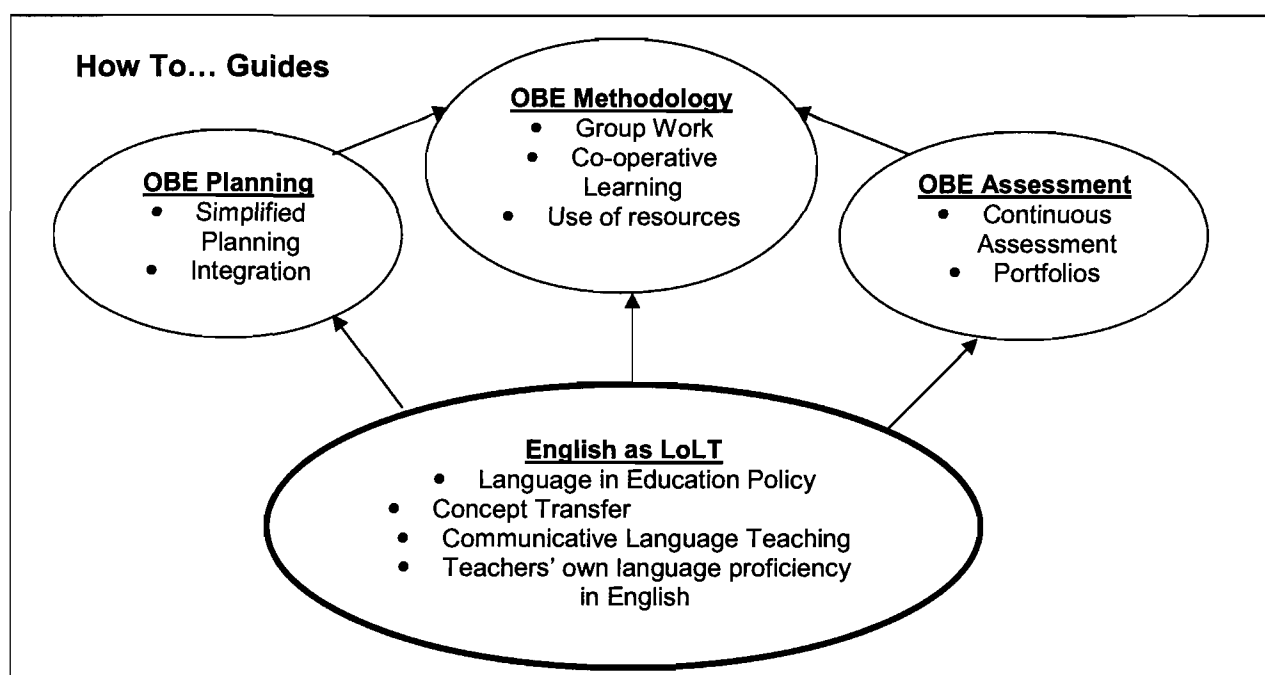
The needs and recommendations of the IDDP Curriculum Baseline Survey Report (Mostert *et al.*, 2002:14) provided qualitative data for the analysis. The writer as researcher and project manager made the report available to the SHC R&D implementation team in preparation for the session. The content of the report served as a starting point for discussion and for critical reflection during the brainstorming session. A documentary analysis of the Intermediate Phase teachers' needs preceded and informed the first evaluative assessment (cf. Chapter 6, Section 6.3.8).

Mostert *et al.* (2002:14) provided the following recommendations for the design of the English as LoLT Course. These recommendations were brainstormed during the session.

- A simple system of planning and lesson preparation should be put in practice.
- A series of guides should be developed in workshops to address problems that have been identified (e.g. *How to ...* guides). They should be simple, specific, concrete, and brief, so that they can be easily referred to. They can be kept in the teacher's file for easy reference, and also used to monitor the intervention.
- The *How to...* guides should illustrate how to plan a learning programme; make use of group work; plan a lesson; compile an educator file; pace lessons and activities; keep a record of learner achievement; give and mark homework; link outcomes and assessment; assess learners; keep records; teach English communicatively.
- The following topics were recommended for inclusion in the *How to ...* guides: Stages of the learning experience; concepts and how to explain them; demonstration lessons; transition to English LoLT Grade 5; continuous assessment; a simple approach to OBE; common errors in English.
- Educators should be made aware of basic, common errors that occur in English and in their own language usage. A guide containing these should be developed.
- The problem of resources should be addressed.
- There should be a homework session at the end of the day to provide a positive context in which learners could do their homework.
- The topics should be organised in macro-categories, such as OBE, Planning, Methodology, and Assessment.
- The role and use of concepts and strategies should form an integral part of all aspects of the intervention.
- The intervention programme should consist of both in-service training (in the form of a series of workshops) and a monitoring programme as developed by the SHC R&D as the project implementing agency in consultation with all role players.

Figure 6 presents a summary of the focus areas of the recommended English as LoLT Course.

Figure 6: Focus areas of the recommended English as LoLT Course



7.3.1.5 Findings

The writer as researcher and project manager communicated the outcome of the brainstorming session to the evaluation team in a letter (cf. Appendix B). The letter summarised the conclusions and recommendations of the brainstorming session.

The first evaluability assessment (Figure 3, Stage 2a) verified the focus areas of the needs identified in the first assessment phase of the evaluation (cf. Chapter 6, Section 6.3.8).

In addition, this evaluability assessment ensured that the conceptualisation of the language programme and the design of the course material would respond to the identified curriculum needs of the Intermediate Phase teachers in the four IDDP schools.

Research literature on curriculum and course design in language learning and teaching emphasises the relevance of a needs analysis, or a needs-based approach to determine the content focus areas of the course (cf. Dudley-Evans & St. John, 1998; Breen, 2002; Ellis, 2004b; Nunan, 2004). Ellis (2004b:205) describes the purpose of course design as a concern with the selection and sequencing of content. He contrasts the content (the *what*) with the methodology (the *how*) of the course that addresses the participatory structure of the classroom and the actual teaching

procedures. Ellis (2004b:205) then defines the language curriculum as the design (the *what*) and the methodology (the *how*) put together.

However, in the case of the proposed English as LoLT Course design, the recommendations on the *How to...* guides (cf. Figure 6) formed the content (the *what*) of the curriculum. The course participants would actively participate in learning how to plan, teach and assess in OBE. They would specifically focus on how to use develop their learners' and their own usage of English as the language of learning and teaching.

The course methodology (the *how*), would generally use OBE learning and teaching strategies in co-operative learning and in group work (cf. Killen, 2002:67). The course methodology would more specifically focus on task-based language learning and teaching, communicative language teaching and content-based instruction within the OBE learning and teaching context of the four IDDP schools (cf. Ellis, 2005; Snow, 2005; Nunan, 2004; Richards & Rodgers, 2001).

The proposed curriculum, the *what* and the *how* of the English as LoLT Course (cf. Ellis, 2004b:105) as described above, was verified by the first evaluability assessment. A brief outline of the proposed course content and methodology follows.

The most apparent gaps identified were: the gap between L1 (home language) and L2 (English as first additional language); the gap between theory and practice in communicative language teaching and the transfer of key concepts in learning areas from the home language to English as the language of learning and teaching.

Two themes would guide the design of the language intervention programme: the first theme would focus on the role of English as the language of learning and teaching and English as the first additional language. The second theme would focus on co-operative learning. Programme participants' skills to facilitate information sharing in the classroom and with their peers would be developed.

Existing draft modules on the following topics were considered as potential course modules: resources (the use of learner support material); lesson planning; questions leading to learning; instructions; note books (recording skills, portfolios); group work and role play in English as the first additional language and the LoLT. An existing Sacred Heart College vocabulary and grammar booklet could be adapted to suit the

context of the suggested course. The evaluation team emphasised that the principle of reflective practice as an underlying principle of assessment would form an integral part of all modules developed. Self-monitoring devices would, for example, be built into the modules.

The English as LoLT Course development and implementation process suggested during the brainstorming session was also documented in a letter (cf. Appendix B). This process involved regular interaction between the writer as researcher, the SHC R&D implementation team and the School of Languages of the North-West University. The evaluability assessment process also included regular interaction with relevant officials from the Free State Department of Education. The SHC R&D implementation team initially envisaged the development of six to seven modules at one module per term. The development of the modules would start from January 2003 and would continue for a period of twenty one months. The module on questions leading to learning was the first module that would be developed.

However, the writer as project manager and as researcher decided in collaboration with the SHC R&D implementation team that an initial interaction with the programme participants was imperative to promote ownership of the language programme and to get a clearer sense of the appropriate level of the course. This decision led to the second evaluability assessment.

In addition, this decision reflected the team's purpose to design an English as LoLT Course that would provide the facilitators with the security of a "coherent framework within which there is the flexibility to respond to the changing needs of learners and which recognises learners as active participants in the language learning process" (Finney, 2002).

7.3.2 Programme Evaluation Stage 2b: Evaluability Assessment Two

7.3.2.1 Purpose

The purpose of the second evaluability assessment was to verify the appropriateness of the level and scope (cf. Figure 3, Stage 2b) of the recommended English as LoLT Course (cf. Figure 6). The SHC R&D implementation team used the second evaluability assessment to broaden their knowledge of the delivery and evaluation context. Face to face interaction with the programme participants in a workshop would increase the effectiveness of the SHC R&D implementation team to design and develop the envisaged course.

7.3.2.2 Participants

The following primary level stakeholders (cf. Chapter 3, Section 3.2.1.1) participated in the second evaluability assessment during the first workshop:

- the writer as researcher and as project manager;
- the SHC R&D implementation team, who facilitated the workshop; and
- sixteen Intermediate Phase teachers from the four IDDP sample schools (twelve of these sixteen teachers eventually participated in the resultant English as LoLT Course) (cf. Section 7.3.2.6).

7.3.2.3 Data collection

A set of qualitative data was collected during the first workshop.

The evaluation team fulfilled the role of participant observers at the workshop. The observations of the SHC R&D implementation team who facilitated the workshop were formally documented at the end of each of the four activities that took place (cf. Table 4). The writer as researcher took her own field notes of the teacher participation observed during the workshop.

Six activities were planned for the workshop (cf. Table 4). These activities would allow the SHC R&D implementation team to assess: teachers' own experience of language acquisition; their understanding and knowledge of first and second language acquisition; their attitude towards English as the LoLT; their skills to transfer concepts from learners' home languages to English as the LoLT; and their own English language usage. Only four of the six activities were completed due to time constraints and other limiting features in the evaluation context. These limiting features are described in the following section.

7.3.2.4 Data Analysis

Facilitators' descriptive assessments of the implementation and evaluation context defined the limiting features in the evaluation context. These features altered the design of the English as LoLT Course (cf. Section 7.3.2.6). The descriptive assessments are presented in Table 4 below as they appeared in a letter from the SHC R&D LoLT Programme Manager (cf. Appendix C).

Table 4: First Workshop Observation Table

ACTIVITY 1: OUR MEMORIES OF LANGUAGE ACQUISITION
Generally, the teachers were unable to find a memory [sic] that related directly to how they themselves learn language. Most teachers reflected on a general learning experience that they remembered from their youth. Given their responses, it was not possible to categorise language issues, and impossible to work out strategies that worked for teachers and then apply them to practice.
ACTIVITY 2: LANGUAGE ACROSS THE CURRICULUM – EVERY TEACHER IS A LANGUAGE TEACHER
<p>The activity worked well in terms of the teachers' ability to respond to the individual questions. The following conclusions can be drawn from the teachers' responses:</p> <ul style="list-style-type: none"> • There is no clear reason in the teachers' minds as to why English is the language of learning and teaching in their schools. They could not articulate what their learners would accomplish by having good English skills; • Teachers found it impossible to talk about strategies and techniques for teaching English. They do not have an extensive – or even limited – repertoire of practices from which they could draw. • Teachers had no pedagogical reasons for their learners experiencing problems with English. Lack of resources and parental apathy were frequently mentioned. • It became apparent that English is only "heard" at school. It is seen as something that only has a place in school. • In the teachers' minds, the responsibilities for teaching language concepts and skills are seen to rest with the language teachers and not with other teachers. • The facilitators decided to end the activity during (b) in the plenary as the teachers were unable to think generally about teachers' responsibilities in terms of language.
ACTIVITY 3: TO EXPLORE THE LOLT PRINCIPLE, "LANGUAGE LEARNING IS A LIFELONG SKILL"
This activity was too hard for the participants. Even with the help of SHC facilitators they were unable to complete it. While much of the fault rests with the activity itself, it did reveal that the teachers were unable to devise a strategy for action to tackle the task. They did not plan which resources would potentially be useful and which would not.
ACTIVITY 4: NEVER UNDERESTIMATE THE VALUE OF PRIMARY LANGUAGES, A MOVE FROM RECEPTIVE TO EXPRESSIVE LANGUAGE
<p>This activity did not achieve its aim either. The teachers were not able to talk about the impact of language on learning in a meaningful way. Instead, they spoke superficially of methodology and became fixated on "code switching" as a technical skill for teachers. They did not see this as one of a range of approaches to developing language competencies.</p> <p>The facilitators decided to stop the workshop at this point, after a brief shared reflection. The aims were not being met and the increasingly complex nature of the activities was deemed to be inappropriate at this point.</p>
ACTIVITY 5: EXPLORE THE LOLT PRINCIPLE, "CHILDREN NEED PLAYGROUND LANGUAGE AND THEY NEED LANGUAGE FOR LEARNING". (Activity not completed)
ACTIVITY 6: SCAFFOLDING LANGUAGE LEARNING IN THE CLASSROOM (Activity not completed)

The above analysis corresponded with field notes made by the IDDP Project Manager as researcher. Teachers' mixed levels of language proficiency and their lack of confidence to provide inputs in English during the workshop became increasingly apparent as the workshop progressed.

A reflection session with the whole evaluation team could not take place immediately after the workshop as the SHC R&D facilitators had to drive back to Johannesburg.

However, an in-depth reflection about the proposed course content and implementation took place among the SHC R&D facilitators on their way to Johannesburg. In addition, the writer as project manager had several informal discussions about the content level of the draft modules with the SHC R&D LoLT Programme Manager at the office in Johannesburg.

7.3.2.5 Findings

The findings of the evaluative assessment therefore flowed from the workshop observations and from a series of informal discussions to assess the level and scope of the proposed English as LoLT Course (cf. Section 7.3.2.1). The outcome of these findings was unforeseen. It indicated that the course had to be pitched at a basic level and that the intended scope of the course had to be reduced. The outcome of this evaluability assessment therefore proved to be valuable to increase the appropriateness of the course.

The writer as IDDP Project Manager and researcher consulted with the SHC R&D implementation team to revise the proposed level and scope at which the English as LoLT Course design should be pitched. The outcome of these negotiations was captured in a revised proposal for the English as LoLT Course design (cf. Appendix D). The findings of the second evaluability assessment therefore led to the consideration of what Rossi and Freeman (cited in De Vos, 2001:380) refers to as “alternative programme options”. The SHC R&D facilitators recommended that the course content be drastically reduced.

The LoLT Programme Manager briefly noted (cf. Appendix C) the assumptions on which the initially proposed modules were based. The listed assumptions indicated that the facilitators had overestimated the teachers’ knowledge and skills in using English as the LoLT effectively.

The letter (cf. Appendix C) presented an outline of the revised proposal for the English as LoLT Course design. A brief discussion of this proposal follows.

7.3.2.6 Recommendations for the English as LoLT Course Design

The SHC R&D implementation team firstly recommended in consultation with the writer as IDDP Project Manager and as researcher that the content of the course needed to be drastically reduced. Each of the LoLT principles and practices in the previously proposed Module 1 would form the core of the new material.

The team furthermore recommended that the two themes of language of learning and teaching and co-operative learning be collapsed into the language theme only. Co-operative learning in, for example, group work, would nevertheless be incorporated in the course material and methodology. The examples would be grounded in very practical tasks for the teachers. This recommendation led to the design of the English as LoLT Course as a task-based curriculum (Ellis, 2004:205; cf. also Richards & Rodgers, 2001).

In addition, the Free State Department of Education advised the writer as IDDP Project manager that workshops could only start from 14:00 in the afternoons. Programme implementation would therefore depend on afternoon workshops and on school-based mentorship visits. Teachers would receive additional assistance with the practical tasks in the booklets during the school visits. This model would be repeated every six weeks. A modular course design would therefore be most appropriate to minimise the potential lack of continuity between classes (Low, 1989:151; Dudley-Evans & St. John (1998:147). The SHC R&D course designers referred to the English as LoLT Course modules or units as *booklets* (cf. SHC R&D Course Participant File, 2003).

Sixteen teachers responded to the invitation sent to the Intermediate Phase teachers of Mathematics, Natural Sciences and English as the first additional language in the four IDDP schools. The teachers who participated in the first workshop therefore attended the workshop voluntarily. Four of these sixteen teachers were already enrolled for other teacher development courses. These four teachers could not participate in the proposed English as LoLT Course in addition to the courses that they were already following (cf. Chapter 4, Section 4.2.2). Twelve teachers would consequently participate voluntarily in the proposed English as LoLT Course. Two district officials from the Inclusive Education sub-directorate would also participate in the course to ensure a district support link with the teachers. The position of the language learning facilitator was vacant at the time.

The alternative English as LoLT Course design and implementation options described above were proposed to and subsequently approved by the primary level stakeholders in this language programme evaluation (cf. Chapter 3, Section 3.2.1.1). The second evaluative assessment had therefore defined the content level and scope of the English as LoLT Course (cf. Figure 3, Stage 2b). The finalised composition of the programme participants and the content of the course are presented below.

7.3.2.7 Finalised English as LoLT Programme Participants and Course Design

Profile of the Programme participants

There were fourteen participants in the course. Twelve participants were teachers from the four representative IDDP schools. In addition, two district officials from the Inclusive Education sub-directorate also participated so that they could remain informed about the detail of course.

The twelve teachers were teaching in the Intermediate Phase and four of these teachers were also teaching in the Senior Phase. Eight teachers were female and four were male. At the time, eight teachers were teaching English as a First Additional language, one was teaching Mathematics, and three were teaching Natural Sciences. However, most of the teachers did not continue teaching in the same learning areas and taught in both the Intermediate and Senior Phases.

The two district officials from the Inclusive Education sub-directorate provided support to the Intermediate and Senior Phase teachers of the Thabo Mofutsanyana District in the Languages, Mathematics and Life Skills learning areas. They specialised in supporting teachers to develop learning and teaching strategies for learners with barriers to learning.

A profile of the twelve teacher participants' identified curriculum needs was compiled. Observation data on the twenty-six Intermediate Phase teachers of the four IDDP sample schools who participated in the needs analysis (Stage 1b) of this language programme evaluation were available (cf. Chapter 6, Section 6.2.6.2). The data for the twelve teachers were extracted. The observation data recorded and reported for these finalised participants are indicated in Table 5.

Table 5: Initial Observation Data of the Twelve Intermediate Phase Teacher Participants in the English as LoLT Course

Variable	N	Mean	Standard Deviation
Planning & organisation	12	2,75	0,89
Written lesson preparation	12	3,21	1,24
Lesson presentation	12	3,45	0,71
Use & usage of English	12	3,68	0,61
Learner output & monitoring	12	3,36	0,70
Atmosphere & relationship	12	4,01	0,75
Learner experience	12	3,22	0,83

Variable	N	Mean	Standard Deviation
Language proficiency rating	12	3,78	0,66
Professionalism	12	4,37	0,64

The observation schedules (cf. Appendix A) used for the initial needs analysis of these twelve teachers' classroom practice, would again be used during the impact assessment phase (cf. Chapter 9, Section 9.3.4). The data in Table 5 are referred to again in Chapter 10 in a comparative analysis between the data of the first and second survey (cf. Table 8) to assess the English as LoLT Course impact.

Finalised Curriculum of the English as LoLT Course

The English as LoLT Course content (in the form of eight booklets) is presented in Table 6. The course moderator facilitated the accreditation process of the English as LoLT Course (cf. Section 7.4.2.1). The SHC R&D course developers explained the content and methodology (cf. Ellis, 2004b:206) of the finalised English as LoLT Course curriculum in the course overview (cf. SHC R&D Course Participant File, 2003;3-12).

The course overview indicated the minimum requirements for teachers to participate in the English as LoLT Course; the course content; the outcomes and assessment criteria per booklet; how to use the course material; the course structure; the course time line and action plan; attendance requirements and the course assessment. This description reflects a broader interpretation of the term curriculum than presented by Ellis (2004b:206). The course overview of the English as LoLT Course reflects "all aspects of the planning, implementation and evaluation of an educational programme, the why, how and how well together with the what of the teaching-learning process" (Finney, 2002:70).

The finalised English as LoLT Course curriculum presented in the course overview of the SHC R&D Course Participant File (cf. 2003) and in Table 6 below has attempted to answer to the following requirements for syllabus design (Breen, 2002:151).

The English as LoLT Course provided a clear framework for the identified knowledge and capabilities that were appropriate to its overall aims (cf. Table 6). The language programme provided continuity and a sense of direction in classroom work for learners and teachers (cf. Appendix T). The curriculum content, learning outcomes and assessment criteria provided a record for other teachers of what was covered in the English as LoLT Course (cf. Table 6). The outcomes and assessment criteria provided a basis for evaluating students' progress (cf. Table 6).

The English as LoLT Course has a task-based syllabus design (cf. Section 7.3.1.5). According to Breene (2002:153), two main task types are identified in task-based syllabuses: communicative tasks, where learners share meaning in the target language about everyday tasks, and meta-communicative tasks (pedagogic tasks), where learners share meanings about how the language works, or is used in target situations and about how they learn the target language. The English as LoLT Course involved the participants on pedagogic tasks in all the booklets (cf. Appendix W). It was thus a very practical course. The finalised English as LoLT Course content is indicated in Table 6.

Table 6: Finalised Course Content, Learning Outcomes and Assessment Criteria for the English as LoLT Course

BOOKLET 1: LANGUAGE IS CRUCIAL FOR LEARNING AND TEACHING		BOOKLET 2: CHILDREN NEED PLAYGROUND LANGUAGE AND SCHOOL LANGUAGE	
Outcomes	Assessment Criteria	Outcomes	Assessment Criteria
<ul style="list-style-type: none"> Participants will express their feelings about the status of English as the language of learning and teaching in their schools. Participants will engage with the official language policy documents and legislation. Participants will establish the range of languages in their schools and communities. Participants will understand the difference between English as a learning area and English as the language of learning and teaching. 	<p>Achievement is evident when the participants:</p> <ul style="list-style-type: none"> have participated in a discussion to express their emotions in a variety of modal forms; have read the official documents and completed the related activity; have engaged in action research concerning language use; have engaged with the concepts and completed the related activity. 	<ul style="list-style-type: none"> Participants will understand the concept of playground language _Basic Interpersonal Communication Skills (BICS). Participants will understand the concept of school language_ Cognitive Academic Language Proficiency (CALP). Participants will understand the differences between the two forms of language. 	<p>Achievement is evident when the participants:</p> <ul style="list-style-type: none"> are able to distinguish between formal and informal language; have created strategies to develop English BICS for their learners; have identified strategies to develop English CALP for their learners.
BOOKLET 3: EVERY TEACHER IS A LANGUAGE TEACHER		BOOKLET 4: LANGUAGE LEARNING IS A LIFELONG SKILL	
Outcomes	Assessment Criteria	Outcomes	Assessment Criteria
<ul style="list-style-type: none"> Participants will understand that every teacher has language-based responsibilities in their classrooms. Participants will establish the language of content-based learning areas for which they are responsible. Participants will understand the need to teach the language of the learning area as well as the content and skills. Participants will foreground language in all their lesson plans. 	<p>Achievement is evident when the participants:</p> <ul style="list-style-type: none"> are able to select appropriate content vocabulary for different learning areas; have engaged with and extended content-specific language; have completed a school-based investigation to establish the need for language learning in content-specific learning areas; have completed a lesson plan foregrounding language issues. 	<ul style="list-style-type: none"> Participants will realise their responsibilities concerning language, given that they are the primary source of English language usage in their communities and classrooms. Participants will be exposed to methods to improve their own language knowledge and usage. Participants will practice model language usage in their classrooms. 	<p>Achievement is evident when the participants:</p> <ul style="list-style-type: none"> have participated in a survey to establish the sources of English language to which their learners are exposed; have learnt and practised new ways of acquiring language; have demonstrated a model lesson introduction with instructions for a task in their classrooms.

BOOKLET 5: NEVER UNDERESTIMATE THE VALUE OF HOME LANGUAGE		BOOKLET 6: MOVE FROM RECEPTIVE TO EXPRESSIVE LANGUAGE	
Outcomes	Assessment Criteria	Outcomes	Assessment Criteria
<ul style="list-style-type: none"> Participants will understand how crucial home language competency is for the acquisition of additional languages. Participants will understand the process through which children learn their home languages. Participants will compare home language acquisition with ways in which children acquire additional language acquisition. Participants will experience a variety of language acquisition strategies appropriate for additional languages. 	<p>Achievement is evident when the participants:</p> <ul style="list-style-type: none"> have participated in a dialogue and expressed their emotions in a variety of modal forms; have read the official documents and completed the related activity; have engaged in action research concerning language use; have engaged with the concepts and completed the related activity. 	<ul style="list-style-type: none"> Participants will understand the concept of receptive language. Participants will understand the concept of expressive language. Participants will be exposed to a range of strategies that engage with receptive and expressive language usage. Participants will know how to affect the move from receptive to expressive language. 	<p>Achievement is evident when the participants:</p> <ul style="list-style-type: none"> have engaged with a range of strategies that focus on receptive language; have engaged with a range of strategies that focus on expressive language; have constructed a hierarchy of the skills involved in the move from receptive to expressive language; have practised selecting an appropriate range of receptive / expressive skills for user-groups of different language abilities.
BOOKLET 7: LANGUAGE SKILLS NEED TO BE CONTEXTUALISED AND IMMEDIATELY USEFUL		BOOKLET 8: LANGUAGE LEARNING IS SUPPORTED BY TEACHING VOCABULARY AND LANGUAGE STRUCTURES	
Outcomes	Assessment Criteria	Outcomes	Assessment Criteria
<ul style="list-style-type: none"> Participants will understand that language that is not contextualised has very little meaning for learners. Participants will learn how to create authentic contexts to enhance language acquisition. Participants will understand that language that is not used immediately is quickly forgotten. Participants will practice selecting language that is immediately useful and learn how to contextualise it. 	<p>Achievement is evident when the participants:</p> <ul style="list-style-type: none"> have experienced and analysed the differences between a contextualised and a decontextualised language learning experience; have been exposed to a range of strategies useful in establishing a context for language learning; have brainstormed and documented instances where new language would be immediately useful; have completed a lesson plan that includes an authentic context for learning immediately useful language. 	<ul style="list-style-type: none"> Participants will learn how to select appropriate vocabulary for their lessons. Participants will be exposed to a range of vocabulary teaching techniques. Participants will learn how to select appropriate language structures for their lessons. Participants will be exposed to a range of techniques to teach language structures. 	<p>Achievement is evident when the participants:</p> <ul style="list-style-type: none"> have learnt how to and practised selecting appropriate vocabulary for their lessons; have engaged with different techniques to teach vocabulary; have learnt how to and practised selecting appropriate language structures for their lessons; have engaged with different techniques to teach language structures.

The two evaluations (cf. Figure 3, Stages 2a,b) assured that the course content would be developed at the appropriate level and within the approved implementation scope. However, the quality of the English as LoLT implementation could only be ensured and assured through effective monitoring. A description of how the English as LoLT Course was monitored is presented in the following section.

7.4 Programme Evaluation Stage 3: Monitoring the English as LoLT Course Implementation

7.4.1 Purpose

The purpose of the programme monitoring stage (cf. Figure 3, Stage 3) was to ensure and assure the quality implementation of the English as LoLT Course over a period of 18 months. The evaluation goal of the successive programme monitoring rounds was formative. This evaluation goal aimed to ensure the effective development of the course and the programme participants through frequent monitoring by a variety of stakeholders in the primary evaluation audience. The quality of the course was assured through the accountability interest of the multiple primary evaluation audience in the development and implementation of an accredited language programme. Their evaluation interest in accountability assured quality learner achievement through the successful completion of each booklet and examination of the accredited language programme.

7.4.2 The Programme Monitoring Process

Effective monitoring of the English as LoLT Course involved the following process. Frequent and regular rounds of data collection and analysis procedures were implemented by the evaluation team. Programme and learner progress monitoring was embedded in the development and delivery of all programme activities through the principle of reflective practice. Qualitative data on the implementation of the English as LoLT Course were collected through observations, field notes and the assessment of participants' portfolios during workshops, mentoring, and assessment sessions. Quantitative data were collected concurrently during these programme delivery and monitoring activities.

A more detailed description of this overall programme monitoring process is structured according to the monitoring activities of primary stakeholders in the evaluation of the English as LoLT Course.

The following stakeholders monitored the implementation process of the English as LoLT Course:

- the course moderator;
- the writer as project manager and researcher;
- officials from the Free State Department of Education;
- the representative of the Flemish Government;
- the SHC R&D implementation team; and
- the programme participants themselves.

Although the monitoring roles of the stakeholders are presented separately in the relevant sub-sections below, the effective monitoring of the English as LoLT Course depended on continuous collaboration among all stakeholders.

7.4.2.1 The Monitoring Role of the English as LoLT Course Moderator

The course moderator, the SHC R&D course developers and the IDDP Project Manager finalised the course content and implementation process after the second evaluability assessment (cf. Table 6). The moderator standardised the course outcomes, assessment standards and activities in collaboration with the SHC R&D Programme Manager for the English as LoLT Course and the IDDP Project Manager. The English as LoLT Course was standardised according to the accreditation requirements for short courses of the North-West University. This short course was also aligned to the accreditation standards of the South African Qualifications Authority (SAQA).

Apart from assuring the quality of the English as LoLT Course through accreditation, the monitoring role of the course moderator ensured the quality of learner output in the language programme. Portfolios of programme participants' assignments on each booklet were submitted for moderation after the SHC R&D implementation team had corrected the assignments. The first and second examination papers were also submitted for moderation.

In addition, the course moderator conducted interviews with each course participant as part of the Booklet 4 assessment activities. This individual assessment was incorporated as the third task of a research project on employment issues in South Africa (SHC R&D Course Participation File: Booklet 4:14-25). The interviews took place on 18 March 2004 (cf. Appendix E).

Programme participants had to demonstrate their competence during the interviews in the following knowledge and skills: the appropriate use of words and phrases related to the topic; an understanding of the positive and negative aspects of group work and a critical understanding of the language learning process used in the research project. Quantitative and qualitative data on learner output were collected concurrently during the interviews. The moderator suggested that the SHC R&D implementation should consider a 5-point rating scale in the evaluation of the programme participants (cf. Appendix E). The continuous moderation of the English as LoLT Course therefore ensured as well as assured the quality of this programme evaluation.

The course moderator ensured that the English as LoLT Course was informed by well-known language acquisition theories and principles in the field of applied linguistics. The English as LoLT Course was, for example, informed by Cummins' (1997:57) distinction between basic interpersonal communication skills (BICS) and cognitive academic language proficiency (CALP). This distinction assisted teachers throughout the course to identify and develop the conversational and academic aspects of learners' language proficiency in their home language and in English as the LoLT. Booklet 2 in the SHC R&D Course Participation File entitled "Children need playground language and school language" provided simple explanations of BICS and CALP, as well as clear applications of these aspects to classroom practice.

The course moderator monitored the content of each booklet before its implementation and assessment. The continuous monitoring of the content developed in the English as LoLT Course consequently ensured and assured the quality of the course content.

The monitoring role of the course moderator therefore assured the quality of the English as LoLT Course.

7.4.2.2 The Monitoring Role of the Writer as Project Manager and Researcher

The quality of the course content was also ensured by the writer in her monitoring role as project manager. She monitored and provided input from national and provincial policies and guidelines to the course developers on outcome based education and on language in education. Booklet 1 in the SHC R&D Course Participation File (2003:28-30) contained, for example, three excerpts from key policies and guidelines that were relevant to the English as LoLT Course.

The writer as project manager facilitated a monitoring process of the booklets by two relevant provincial officials of the Free State Department of Education. These officials were two Chief Education Specialists in the Curriculum Delivery and Support Directorate responsible for curriculum development and delivery in the General Education and Training Band. This monitoring process led, for example, to the substitution of the first lesson plan in Booklet 3 in the SHC R&D Course Participation File (2002: 29-37) with a lesson plan compiled by a Learning Facilitator in the Free State Department of Education. The example lesson plan illustrated the integration of English language teaching in a Natural Sciences lesson plan.

In addition, the writer as project manager was accountable for the overall implementation process of the English as LoLT Course as an intervention programme of the IDDP. The project manager therefore had to ensure that the implementation process took place as planned through regular programme monitoring. The project manager provided quarterly reports to the strategic partners on progress in the English as LoLT Course implementation. These quarterly reports provided qualitative and quantitative progress evaluation reports to the Flemish Government and to the Free State Department of Education (cf. Appendix F for an example of an IDDP Quarterly Progress Report).

The outcome of the second evaluability assessment slowed down the implementation process. The initial course design had to be reviewed to accommodate the adjusted content level and scope of course implementation (cf. Section 7.3.2). The course implementation was due to start in April 2003, but only started in June 2003, as indicated in the course timeline and action plan of the SHC R&D Course Participation File (2003:10). However, the project manager negotiated the delayed course delivery timeframes with all stakeholders in the primary evaluation audience in the overriding interest of quality programme delivery.

The writer as IDDP Project Manager collaborated with the Representative of the Flemish Government, who conducted an external midterm evaluation of the IDDP Project in the third quarter of 2003. This midterm report (cf. Appendix G) confirms that the renegotiated timeframes of the English as LoLT Course were accepted. The representative of the Flemish Government reported that the language programme implementation was on track. Her midterm report highlighted the quality implementation of the English as LoLT Course in the context of Intermediate Phase curriculum and teacher development in the ten IDDP schools. The representative

furthermore noted the collaboration of the SHC R&D consultants in curriculum and teacher development in Intermediate Phase Mathematics and Natural Sciences.

In addition, the writer monitored the implementation process of the English as LoLT Course as the researcher of this case study in language programme evaluation. The researcher monitored the following implementation phases in the English as LoLT Course: the design of a booklet; the presentation of a booklet at a workshop; the mentorship support provided on a booklet, and the assessment of a booklet (cf. Table 7).

The researcher monitored the quality of the process as a participant observer and collected qualitative data in field notes taken of the observed process (cf. Appendix H for an example of the field notes). The observations did not follow any particular order as these monitoring sessions had to slot in with the action plans of the SHC R&D implementation team and the project manager. The monitoring and observation schedule of the four implementation stages is presented in Table 7.

Table 7: Monitoring and Observation Schedule: English as LoLT Course implementation process

Stage	Booklet	Content	Date
Workshop	4	Development of language pledge	26 January 2004
Development	5	Language acquisition: home and additional languages	20 February 2004
Mentoring	7	Develop language skills that are contextualised and immediately useful	26 – 27 July 2004
Assessment	7	Develop one whole school routine to promote the use of English	1 September 2004

The monitoring and observation of the workshop stage at the beginning of 2004 provided an example of the interaction between two evaluation roles of the IDDP Project Manager. The research role of the project manager as the writer of this case study placed more emphasis on the observation of the workshop. The IDDP Project Manager explained to the programme participants at the beginning of the workshop that she would observe the workshop as a researcher. She asked them to continue with their workshop activities as usual. She assured them that she was not evaluating their responses, but that she was observing the process.

However, the teachers were not very motivated to participate in the workshop activities. The workshop started at 14:15 and some teachers arrived late. It was hot

that afternoon. The teachers also had to spend some time earlier in the day to coach their learners for an athletics event. The IDDP Project Manager then gave precedence to her quality assurance role in monitoring the English as LoLT Course implementation process. She participated for ten minutes in the workshop in her role as project manager. She motivated the teachers to give their maximum collaboration for their personal, as well as their learners' benefit. The IDDP Project Manager then resumed her research role. The quality of the teachers' participation had improved after this intervention.

The monitoring role of the writer as project manager therefore quality assured the course content and implementation process. In addition, the writer found that her role as participant observer in the English as LoLT Course as a case study contributed to an increased insight in the development and delivery challenges of the course during its implementation phase.

7.4.2.3 The Monitoring Roles of the SHC R&D Implementation Team

The monitoring roles of the SHC R&D Implementation Team are described according to their functions as managers, developers, facilitators, and assessors in the English as LoLT Course.

The English as LoLT Course Programme Manager

The role of the English as LoLT Course Programme Manager was to assure the quality of the English as LoLT Course through the development of a standardised course content and implementation process. The programme manager shared the performance indicators of the English as LoLT Course with all stakeholders in the primary evaluation audience. She provided the minimum participation requirements for the English as LoLT Course, as well as its standardised content, material, structure, timeline and action plan, attendance requirements, and assessment strategies. This information was presented in the introductory section of the SHC R&D Course Participation File (2003:3-13).

In addition, the English as LoLT Course Programme Manager ensured the quality of the course through the continuous monitoring of its delivery according to the standardised performance indicators. The programme manager edited each booklet to ensure the quality of the course material. She monitored the brainstorming sessions and the assessment of programme participants' portfolios. The English as LoLT Programme Manager was ultimately responsible for the compilation and verification of programme participants' learner achievement records (cf. Appendix I).

The cumulative mark sheets were also aligned to cumulative level descriptors in line with OBE assessment practices (cf. Appendix J).

The programme manager collaborated with the course moderator to assure the quality of the booklets. The programme manager also submitted the portfolios and examination papers of the programme participants for moderation. The monitoring role of the English as LoLT Course Programme Manager therefore assured and ensured the quality of the language programme implementation.

The Course Developers

The course developers monitored the alignment of the course material with the relevant OBE policies, language learning strategies, learning outcomes, and assessment standards of each booklet. The material developers further ensured that the level and scope of the course content remained appropriate in all the booklets. The brainstorming sessions held before the development of each booklet were used as a monitoring mechanism for this purpose.

The input of the course facilitator during these brainstorming sessions was essential. She provided feedback on her assessment of programme participants' responses to the course material during the workshops and mentorship sessions. The course developers used the facilitator's input to monitor that the workshop and assessment activities remained context related and at the appropriate level.

The input of the course facilitator was used to monitor whether the participants' needs to use English as the LoLT were continuously addressed in the development of the course material. Opportunities for programme participants to develop their own grammatical knowledge and usage in self-study exercises were incorporated in Booklets 4 to 7 (cf. SHC R&D Course Participant File, 2003), following a perceived need in this regard. Programme participants also received guidelines on essay writing in Booklets 5 to 8 (cf. SHC R&D Course Participant File, 2003), after they had realised that they needed practice in expressing their thoughts clearly and logically in English. An additional assessment activity in Booklets 5 to 8 (cf. SHC R&D Course Participant File, 2003) provided the participants with opportunities to practice their essay writing skills.

The fact that the course developers were situated in another province posed challenges in the alignment of the material with the programme participants' contextual needs in their OBE classroom practice. However, frequent communication

with the writer in her role as project manager and as researcher addressed the challenge of providing relevant provincial guidelines in the course content.

The Course Facilitator

The course facilitator was a SeSotho-speaking lady who had a good command of her home language and of English as her first additional language (cf. Chapter 3, Section 3.2.1.1). She monitored programme participants' responses to the workshop and assessment activities during the workshop and mentoring sessions. Programme participants' initial responses to the learning material were monitored during the workshop sessions. The trainers' monitoring role was primarily developmental. She monitored the development of programme participants' knowledge and skills during the workshop sessions.

The course facilitator monitored the development of teachers' skills to apply the workshop information to their own teaching contexts during her mentorship visits to the four schools. The assessment activities of each booklet provided teachers with opportunities to practice the application of their knowledge and skills in the use of English as the LoLT in their classrooms. They had to prepare draft responses to the assessment activities for the mentorship visit.

However, the meaningfulness of the developmental monitoring that took place during the mentorship sessions depended on the degree to which the teachers had prepared their draft responses.

The SHC R&D Assessment Team

The SHC R&D assessment team consisted of the English as LoLT Course Programme Manager, the two course developers and the facilitator (cf. Chapter 3, Section 3.2.1.1). The evaluation interests of each member in the assessment team described above were represented in the monitoring and evaluation of learner output in the English as LoLT Course. The assessment team addressed the evaluation goals of accountability, curriculum, and teacher development while monitoring learner output throughout the course implementation phase. The monitoring role of the assessment team included formative and summative assessments of learner output in the portfolio and examination tasks.

The assessment activities of each booklet were designed to monitor and support learner progress according to the assessment criteria of each learning outcome. The team monitored and supported learner progress in the learning outcomes during the

workshop activities. The team assessed learner progress according to clear assessment guidelines and grids. These assessment measures were shared with programme participants in the course content and explained to them during the workshops and mentoring sessions. Examples of clear assessment guidelines and grids for the assessment activities were presented in all the booklets and in the portfolios of the SHC R&D Course Participant File (cf. 2003) (cf. Appendix U).

Learner progress was recorded per individual learner (cf. Appendix I for a cumulative mark sheet). The SHC R&D assessment team returned the corrected assessment activities of each booklet in the portfolios to the programme participants. The course facilitator used the returned and corrected assessment activities to provide further feedback and support during the mentoring sessions. Programme participants had to obtain a pass mark of 65% for each mark-based assessment activity in the portfolio booklets, as well as in the examinations. However, the participants were offered mentoring by the course trainer and they could resubmit their assignments for assessment. The assessment team used the quantitative and qualitative data on learner progress to provide focused, developmental monitoring and support.

In addition, evidence of a sustained emphasis on developmental monitoring and support is provided in the following description of the assessment process. Programme participants' portfolios on the first three booklets were assessed before 20 October 2003. The assessment team provided individual mentorship to the teachers at the four schools as examination revision support on 20 October 2003. The first examination on Booklets 1 to 3 took place on Friday, 31 October, as indicated on the course action plan in the Course Participation File (2002: 10). Participants' portfolios on the remaining five booklets were assessed before 23 September 2004. The assessment team then provided individual mentorship to the teachers as examination revision support for the final examination. Two additional mentorship sessions were provided to individual participants before their final examinations on 15 and 16 September, as well as on 23 September 2004.

The evaluation goal of accountability was achieved through standardisation sessions before the team assessed learner output (cf. Appendix H). The team analysed learner output together after each member had corrected three participant responses to a particular assessment activity. These assessments were consequently standardised per activity. The assessment of all the activities in a particular booklet portfolio were then analysed and standardised. After the assessment team had completed this process, two members of the team assessed the activity. The marks

were then averaged to increase the inter-rater reliability of the assessment (cf. Chapter 6, Section 6.4.2). In addition, the assessed activities were moderated to further increase the reliability of the assessments.

The assessments were verified through the subsequent moderation process. Participants' portfolios were submitted to the course moderator after the team had completed their assessments per booklet.

7.4.2.4 The Monitoring Role of Programme Participants

The workshop and assessment activities in all the booklets of the SHC R&D Course Participation File (2003) created ample opportunities for participants to monitor their progress in the course. Twelve teachers from the representative sample of four IDDP schools and two district officials participated in the English as LoLT Course (cf. Section 7.3.2.8). Their evaluation interest of teacher self-development was promoted through their discussions of the course material with the course facilitator.

The twelve teachers and the two district officials also participated in reflexive discussions and in curriculum development activities in the Intermediate Phase Professional Working Groups (PWGs). Teachers from the ten IDDP schools, including the twelve teachers from the four IDDP schools, regularly met to share their classroom practice experience with their peers, to identify best practices and to develop appropriate learning and teaching support material. The IDDP quarterly reports provided evidence about the functioning of the PWGs (cf. Appendix F).

In addition, the fourteen programme participants (twelve teachers and two district officials) assessed progress in the development of their own English language usage through peer and self-assessment, as well as through reflective practice. Peer assessment was, for example, used to monitor and develop participants' essay writing skills. Teachers followed an essay writing process in Booklets 5 to 8 (cf. SHC R&D Course Participant File, 2003), which was divided into fourteen steps. Each step in the process was explained before participants were required to submit their writings in the booklets' assessment portfolios. Three of the fourteen steps required peer assessment. The essay topic assisted participants to monitor the development of their knowledge to use learners' home language in the acquisition of English as the LoLT.

Grammar exercises for self-study were included from Booklets 4 to 7 (cf. SHC R&D Course Participant File). These exercises provided participants with opportunities to monitor their understanding and application of grammatical structures through self-

assessment. Participants could further develop their understanding of pronouns, prepositions, adjectives, and collective nouns. They could also practise the use of tenses.

The emphasis on reflective practice in the course content developed programme participants' ability to monitor not only their own development, but also the application of the course activities to their classroom practice. The implementation of reflective practice in the course assessment activities therefore promoted action research in the classroom, the learning areas, and in the whole school.

The monitoring roles of the programme participants created opportunities to ensure and assure the quality of curriculum input and learner output in their classrooms and the quality of their own language proficiency. The twelve teachers and two district officials who participated in the English as LoLT Course consequently responded to their main evaluation interests of curriculum development and of teacher self-development through the continuous monitoring process described above. However, teachers and district officials found time constraints and having to attend meetings at very short notice to be a major challenge in their ability to fulfil their monitoring roles as effectively as they would want to.

7.5 Conclusion

Programme evaluation stages two and three (cf. Figure 3) were described in this chapter. The two evaluability assessments (Stages 2a,b) and the monitoring process (Stage 3) of the English as LoLT Course were described. These descriptions emphasised the importance of continuous monitoring during the course implementation phase to ensure and assure the appropriateness and usefulness of the English as LoLT Course curriculum.

In addition, the description of the verification (Stages 2a,b) and monitoring (Stage 3) of the English as LoLT Course curriculum created opportunities for the language programme to respond to the formative evaluation goals of curriculum and of teacher-self development.

The response of the English as LoLT Course to promote curriculum and teacher-self development is evaluated in Chapter 8. The evaluation of the guidelines provided by Lynch (1996, 2003) to present a valid descriptive evaluation of the English as LoLT Course in the implementation phase is offered in the meta-evaluation section of Chapter 8.

CHAPTER 8

PHASE TWO (CONTINUED): EVALUATION AND META-EVALUATION OF THE ENGLISH AS LoLT COURSE IN THE IMPLEMENTATION PHASE

8.1 Introduction

The purpose of this chapter is twofold. It provides a descriptive evaluation of the English as LoLT Course response (cf. Figure 3, Stage 4) to the Intermediate Phase teachers' curriculum needs as established in the first programme evaluation stage (cf. Figure 3, Stage 1b). In addition, the chapter evaluates whether Lynch's (1996:4) CAM provided effective guidelines to enable a valid evaluation of the English as LoLT Course in the implementation phase of this case study (cf. Chapter 1, 1.5).

This chapter continues the evaluation of the English as LoLT Course implementation phase introduced in Chapter 7. The previous chapter described the second (cf. Figure 3, Stages 2a,b) and third (cf. Figure 3, Stage 3) language programme evaluation stages in this case study. The second stage described the two evaluative assessments and the third stage the continuous monitoring process of the English as LoLT Course.

In this chapter, the seven evaluation themes of the needs assessment phase (cf. Chapter 5, Section 5.4.1) structure the quantitative analysis of whether, and the qualitative analysis of how, the English as LoLT Course responded to the teachers' identified needs (cf. Table 3). This descriptive evaluation provides a predominantly qualitative content analysis of the English as LoLT Course curriculum. The term *curriculum* refers, in this study, to the content and methodology of the language programme (cf. Ellis, 2004b:205) (cf. Chapter 7, Section 7.3.1.5). In addition, the term *curriculum* is interpreted in a wide sense of including its underlying theories, principles, implementation and evaluation (cf. Finney, 2002:70) (cf. Chapter 7, Section 7.3.2.7).

The analysis considers relevant literature to determine whether the English as LoLT Course curriculum was based on sound principles of current second language research in learning and teaching. In addition, the analysis considers whether the course offered practical examples of OBE principles and policy applied at the appropriate level of the programme participants.

The seven evaluation themes of the needs assessment phase that structure the evaluation of the English as LoLT Course response to the Intermediate Phase teachers' identified needs are: the tension between Outcomes-based Education policy and classroom practice; English language learning and teaching; teacher and learner motivation and attitude toward learning and teaching; management support to the implementation of English as the LoLT; the role and

status of English in the project schools; the role and status of the Intermediate Phase teachers in curriculum decisions; and the role and status of English in the Phuthaditshjaba community.

The first part of this chapter presents the descriptions and conclusions of the content analysis per evaluation theme. The recommendations for the refinement of the course that follow from these conclusions are presented in Chapter 11, Section 11.2.2. The descriptive evaluation section concludes with an overall evaluation of the English as LoLT Course response in the implementation phase of this case study (cf. Section 8.2.9).

The second part of this chapter evaluates the effectiveness of Lynch's (1996:4) CAM to guide the evaluation of the English as LoLT Course in the implementation phase. This evaluation is presented according to the core criteria of flexibility, appropriateness, clarity of description and clarity of logic (cf. Chapter 2, Section 2.5.3.5). Reflexive comments on the effectiveness of the guidelines to present a convincing descriptive evaluation of the language programme response are presented. These comments on the usefulness and relevance of verification (Stages 2a,b), monitoring (Stage 3) and course evaluation (Stage 4) in the implementation phase conclude this meta-evaluation section.

8.2 Descriptive Evaluation of the English as LoLT Course Curriculum

8.2.1 *Tension between Outcomes-based Education Policy and Classroom Practice*

The needs assessment phase established that teachers needed clear and practical examples of classroom practice in the following focus areas: planning and presentation of a learning experience; overall planning and organisation of OBE learning experiences and the management of learner output and homework. The descriptive evaluation below examines the response of the English as LoLT Course to the detailed needs listed in each of these focus areas (cf. Chapter 6, Section 6.3.8) (cf. Table 3).

The descriptive evaluation also analyses an example of a Grade 4 Natural Sciences lesson plan included in Booklet 3 of the English as LoLT Course (SHC R&D Course Participant File, 2003:29-36). This booklet (SHC R&D Course Participant File, 2003:1-44) focuses on the inclusion of English as LoLT teaching strategies in OBE.

8.2.1.1 Planning of a Learning Experience

A Simplified Planning Format

Both Harmer (2004:313) and Scrivener (2005:118) indicate that a formal lesson plan plays an essential role in effective teacher training. However, the planning format

previously used by the teachers was too complex. The needs assessment of the Intermediate Phase teachers indicated that they needed to use a simplified lesson planning format.

The Teacher's Guide for the Development of Learning Programmes in Natural Sciences (cf. DoE, 2003c:2) defines a lesson plan as "planning for groups of linked activities or single activities". The illustration of a lesson plan for Grade 5 learners provided in these departmental guidelines (DoE, 2003c:53,4) offers a series of activities for one week. The tension between OBE policy and practice in planning still remains in the amount of detail provided in planning for a specific activity. The guidelines (DoE, 2003c:54) note that the "Lesson Plan itself can be broken up into individual activities or may be dealt with as a series of activities within which the learning, teaching and assessment need to be worked out in detail".

The first evaluation question asks whether the simpler planning format provided in the English as LoLT Course (cf. Appendix S) bridged the gap between the application of a weeklong and a daily lesson plan in OBE classroom practice.

The second evaluation question wants to know whether the course content provided an example of a lesson plan with clear aims and stages. According to Scrivener (2005:118), a clear statement of appropriate aims of the lesson and a clear list of stages in the lesson, with a description of activities, are required in a formal lesson plan.

A third evaluation question asks whether the example of a simplified planning format provided a detailed, structured, activity-breakdown in line with the aim of the lesson.

The simplified lesson plan on 'Water' in Booklet 3 (SHC R&D Course Participant File, 2003:29-36) provides evidence (cf. Appendix S) of single activities that could be implemented in one lesson. The aim of the lesson is clearly indicated. Grade 4 learners will be able to know what water is, what the uses of water are and where water is found. The stages and activities of the lesson are described and are related to assessment activities (cf. Appendix S).

The provincial Curriculum Development Section of the Free State Department of Education requested the Natural Sciences Learning Facilitator to provide an example of a lesson plan with a simplified planning format. The Learning Facilitator was an experienced Intermediate and Senior Phase curriculum adviser. She designed a

simplified lesson plan (cf. Appendix S) in collaboration with the SHC R&D course developers. This lesson plan was informed by the adviser's practical teaching experience and knowledge of OBE in general and of the Natural Sciences learning area in particular.

The focus on language learning strategies in the Natural Sciences lesson plan (cf. Appendix S) is particularly relevant to this evaluation. The lesson plan format provided a space for the inclusion of English content vocabulary as well as English question and instruction phrases needed to facilitate learning in the Natural Sciences Learning Area.

The English as LoLT Course content created opportunities for participants to identify the required content vocabulary. They could also formulate questions and instructions that would guide learners to do their tasks. According to both Tsui (2002:123) and Killen (2000:45), question phrases direct active learner participation during the learning experience. The investigation of the properties of water and its use in the local context created opportunities for Grade 4 learners to use their English BICS to develop their English CALP in the Natural Sciences learning area (cf. Cummins, 1997:57).

Assessment Activity 3 in Booklet 3 (SHC R&D Course Participant File, 2003:43) created opportunities for participants to provide examples of how they would use English question and instruction phrases to structure a lesson plan according to its introductory, activity and conclusion phases. The course therefore provided opportunities for the twelve teachers who taught in content learning areas, for example in Natural Sciences, to prepare for "what learners will have to do in English and the skills and language needed" (Dudley-Evans, 2002:133).

However, the following omissions in the example of the lesson plan (cf. Appendix S) led to its over-simplification. A space to indicate the integration with other learning areas, when applicable, was omitted (cf. DoE, 2003c:54). Farrell (2002:35) emphasises that time management should be indicated in lesson planning to ensure effective activity-based learning and teaching. However, the overall time of the lesson was not indicated, nor the time allocated to the introductory activity. The simplified lesson planning format (cf. Appendix S) also did not have a space to explicitly link the assessment standards with the learning outcomes at the beginning of the lesson (cf. DoE, 2003c:54).

Conclusion

The above analysis shows that Booklet 3 (SHC R&D Course Participant File, 2003:29-36) provided a simplified, yet specific, planning format. The example provided to course participants (cf. Appendix S) is in line with the Teacher's Guide for the development of Learning Programmes in Natural Sciences (cf. DoE, 2003c:84). The example could be used for a daily lesson plan. The course content therefore bridged the gap between examples of weeklong and daily lesson plans.

The space provided for English content vocabulary and question and instruction phrases to be taught before the structured Natural Sciences lesson activities, promotes the application of English language learning and teaching strategies (cf. Dudley-Evans, 2002; Tsui, 2002; Cummins 1997). In general, it also complies with the requirements of formal planning formats and specified time management for effective teacher training in second language learning and teaching (cf. Harmer, 2004; Scrivener, 2005; Farrell, 2002).

However, the omission of space to indicate integration with other learning areas and an explicit link between the assessment standards with the learning outcomes (cf. Appendix S) led to an over-simplification of the lesson planning process. This could compromise the quality of the learning experience. The omission of a time allocation for the overall lesson presentation, as well as for the introductory activity in the simplified planning template, could confuse teachers' time management of the lesson.

Clarification of Outcomes, Values, Attitudes in OBE Planning

The needs assessment of the Intermediate Phase teachers in the 4 IDDP schools (cf. Table 3) established that outcomes, values, attitudes and terminology needed to be clarified in order to plan effectively for an OBE learning experience.

Killen (2000:xiv) provides the following key questions to guide teachers' planning to ensure that learners achieve the learning outcomes:

- * What do I want my learners to be able to do at the end of my instruction?
- * What knowledge and insights do I want my learners to acquire?
- * What skills do I want my learners to be able to demonstrate?
- * What attitudes/dispositions/values do I want my learners to have?
- * Why is it important for my learners to learn these things?
- * How will I know when my learners have developed the knowledge, skills and attitudes that I want them to develop?

The above key questions are used to evaluate the example of the Natural Sciences lesson plan offered in Booklet 3 of the English as LoLT Course (SHC R&D Course

Participant File, 2003:29-36). The evaluation below analyses whether the example (cf. Appendix S) clarified the outcomes, values, attitudes and OBE terminology in the lesson plan.

The Teacher's Guide for the Development of Learning Programmes in Natural Sciences (cf. DoE, 2003c:25) defines learning outcomes as descriptions of "what learners must be able to do with a certain range of scientific knowledge".

The Natural Sciences Learning Facilitator designed a lesson plan that would develop Grade 4 learners' competence in conducting scientific investigations (Learning Outcome 1), in constructing scientific knowledge (Learning Outcome 2) and in exploring science, society and the environment (Learning Outcome 3). These very broad OBE learning outcomes for Intermediate Phase learners in the Natural Sciences Learning Area (DoE, 2003:21) were clarified and simplified in the aim, the activities and assessment checklists of the lesson (cf. Appendix S).

This example (cf. Appendix S) provided clear answers to Killen's (2000:xiv) first three guiding questions about what learners would be able to do, know and understand by the end of the lesson. The three assessment checklists also provided answers to Killen's (2000:xiv) last question about teachers' being able to measure learner competence in the outcomes.

Killen's (2000:xiv) questions about the development of learners' attitudes and values and the importance of developing these, are linked to the description of the critical outcomes in the lesson plan (cf. Appendix S). The critical outcomes in the Natural Science lesson plan (cf. Appendix S) encouraged the development of Grade 4 learners as problem solvers, communicators, contributing citizens and lifelong learners. These roles are linked to the seven critical outcomes and to the five developmental outcomes that constitute the underlying philosophy of OBE (cf. DoE, 2003c:5).

The lesson plan relates the critical and developmental outcomes of OBE to the learners' roles and to the Natural Sciences learning outcomes of the lesson plan (cf. Appendix S). The acquisition of knowledge and skills to ensure the availability, effective use and storage of water mattered greatly to the Grade 4 learners in Phuthaditjhaba. This rural area frequently experiences a shortage of water. The selection of these learning outcomes therefore promoted the acquisition of positive values and attitudes in learners' roles as contributing citizens to conserve water; as

lifelong learners to continue learning about the effective use of water; as problem solvers to keep water clean, and as communicators to communicate about the importance of dealing responsibly with water.

In addition, the above discussion provides evidence that the lesson plan illustrated how teachers could formulate appropriate learning outcomes that are relevant to the context of the learners.

However, the Teacher's Guide for the Development of Learning Programmes in Natural Sciences (DoE, 2003c:25) indicates the following time allocation in lesson planning: seventy percent of the time should be allocated to the science core knowledge and concepts; thirty percent should be allocated to the extent of this core knowledge to the context of the learner in his/her community. The lesson plan (cf. Appendix S) only highlights the science core knowledge and concepts to be taught.

A second example of a lesson plan was also used in Assessment Activity 3 in Booklet 3 (SHC R&D Course Participant File, 2003:39-44). This booklet (SHC R&D Course Participant File, 2003:33-37) contained an assessment activity that would lead teachers to reflect on lesson planning and on the inclusion of English question and instruction phrases in lesson plans. The English as LoLT Course material was furthermore structured in such a way that the planning examples were presented fairly early in the course. The course structure provided subsequent opportunities to practise the interpretation and application of OBE terminology in the Intermediate Phase teachers' planning skills (cf. Appendix T).

Conclusion

The above analysis of the Natural Sciences lesson plan in Booklet 3 (SHC R&D Course Participant File, 2003:29-36) provides evidence that the course illustrated how to interpret and clarify outcomes, values, attitudes as OBE terminology in a daily lesson plan. In addition, the course created follow-up activities to further develop teachers' skills in the interpretation and application of OBE terminology in their lesson planning.

However, the example did not clearly indicate how the critical outcomes would be integrated in the lesson. In addition, the course did not provide specific guidelines, such as, for example, a set of guiding questions (cf. Killen, 2000:xiv) on how to incorporate outcomes, values and attitudes in OBE planning.

8.2.1.2 Presentation of a Learning Experience

The Variation of Interaction Patterns

The needs assessment (Chapter 6, Section 6.3.8) indicated that teachers needed to develop their knowledge and skills to increase the variation of interaction patterns during their lesson presentations.

Scrivener (2005:84) indicates that the common types of student grouping to ensure varied interaction include: whole class working together with teacher; whole class moving around and mixing together as individuals; small groups of 3 to 8 learners, and individual work. He suggests that varying groupings is one way of enabling a variety of experiences for the learner. Killen (2000:10) observes that variation in the type of learner involvement in the lesson and in the type of learning material seems to be the most effective types of variety.

The lesson plan in Booklet 3 (SHC R&D Course Participant File, 2003:29-36) illustrated the application of varied types of learner involvement and learning material. The introductory activity, for example, created an opportunity for learners to interact individually with learning resources. Learners could explore the colour, shape, feel and smell of three liquids, namely, water, baby oil and paraffin. They could brainstorm the uses of water with the other learners in their small groups before providing feedback to the whole class in the next activity.

The workshop activities in Booklet 3 (SHC R&D Course Participant File, 2003:1-44) varied from programme participants working in pairs (Activity 1); to reflection by the course trainer on her role in the course (Activity 2); to individual listing of the eight OBE learning areas (Activity 3); to working in pairs to identify the learning areas according to lists of content vocabulary provided (Activity 4); to individual reflections on the example of the completed Natural Sciences lesson plan for Grade followed by shared reflections with the whole group (Activity 5).

Conclusion

The above description of varied interaction patterns in the lesson plan (cf. Appendix S) and of the workshop activities in Booklet 3 (SHC R&D Course Participant File, 2003:1-44) provides evidence that the English as LoLT Course curriculum was successful in providing examples of varying interaction patterns. This curriculum was aligned to well-known teaching practices (cf. Scrivener, 2005; Killen, 2000).

Effective Management of Varied and Active Learner Participation in Collaborative Learning

The needs assessment also expressed a need for the development of teachers' planning and facilitation skills to promote active learner participation in collaborative learning through the effective management of group work (cf. Chapter 6, Section 6.3.1).

The Revised National Curriculum Statement Policy (DoE, 2002b:8-9) envisages the learner as an active participant in lifelong learning and in society. The envisaged role of the teacher includes the mediation and management of learning. Killen (2000:72-98) describes small-group work as a teaching strategy to manage active learner participation in OBE. Ellis (2004:263) also acknowledges the importance of small-group interactions in task-based methodology. Killen (2000:99) indicates the relevance of small-group work to co-operative learning.

However, co-operative learning is more than small-group work, as it places special demands on the learners and teachers. Killen (2000:99) defines co-operative learning as "an instructional technique in which learners work together in small groups to maximise their own learning and the learning of their peers". A reputable online resource New Horizons (2005) indicates that co-operative learning is one of the best researched teaching strategies. The results show that "students who have opportunities to work collaboratively, learn faster and more efficiently, have greater retention, and feel more positive about the learning experience". Killen (2000:99-100) confirms that co-operative learning is well-researched, versatile and effective.

Ellis (2004b:269) assesses the effectiveness of group work in task-based pedagogy as the extent to which group work results in co-operative learning through collaborative dialogue. Seville-Troike (2006:111) argues that interaction not only facilitates language learning, but is a causative force in language acquisition.

The planning for the first activity in the Natural Sciences lesson (cf. Appendix S) created opportunities to develop teachers' skills in the facilitation of varied interaction patterns, as well as active learner participation in collaborative learning. Learners had to look at pictures of ten objects. They had to identify objects that needed water and objects that did not need water. Learners would then individually write down the uses of water next to each object that needed water. They would brainstorm their answers in small-groups and the different groups would provide oral feedback to the whole class.

In addition, Tsui (2002:122) views teacher questions as an important dimension of classroom interaction. Booklet 3 (SHC R&D Course Participant File, 2003:24-28) introduced teachers to the use of English question and instruction phrases to manage varied and active learner participation (cf. Appendix U). Programme participants had to complete a school-based survey about their colleagues' use of question and instruction phrases. The purpose of this survey was to help the staff understand that every teacher is a language teacher. The task illustrated co-operative and collaborative learning in a practical way (cf. Appendix U).

The twelve teachers were instructed to interview at least 8 colleagues for the survey. They had to share the results of the survey with the whole staff of the school and then write down their findings. The assessment criteria of Assessment Activity 2 (cf. Appendix U) required the teachers to write down the survey results in accurate and complete sentences. Teachers would then be focusing on language forms in the target language while completing their task. Assessment Activity 2 (cf. Appendix U) provides evidence of co-operative and collaborative learning in a task-based approach to language learning and teaching.

Booklet 8 (SHC R&D Course Participant File, 2003:5-24) consolidates English learning and teaching strategies (cf. Appendix V). Some of these strategies such as brainstorming, using peers to build meaning, playing games and dialogues also promote co-operative learning principles in OBE.

Conclusion

The English as LoLT Course therefore modelled and illustrated the practical application of co-operative and collaborative learning in a task-based approach to language learning and teaching in an OBE context (cf. Killen, 2000; Scheepers, 2000; Ellis, 2004b; Tsui, 2002; Seville-Troike, 2006).

However, the English as LoLT Course did not provide basic descriptions of collaborative and cooperative learning. In addition, the course did not explicitly outline steps to facilitate the practical application of, for example, collaborative learning in a task-based approach (cf. Nunan, 2004:187-194; Ellis, 2004b:263-272).

Content Variety in the Lesson Presentation Ensured through Proper Lesson Planning and Effective Pacing

The need to develop teachers' skills in ensuring content variety was identified during the needs assessment phase of this case study (cf. Chapter 6, Section 6.3.8).

The Teacher's Guide for the Development of Learning Programmes in Natural Sciences (cf. DoE, 2003b:24) illustrates planning for content variety in Intermediate Phase learning programmes, work schedules and lesson plans across four main content areas. In addition, content variety in, for example, a Natural Science lesson (cf. DoE, 2003b:25), stems from the integration of the main content area knowledge and the knowledge related to economic, environmental, social or health matters that could be of interest to the learners and the local community. The Teacher's Guide for the Development of Learning Programmes in Natural Sciences (cf. DoE, 2003:25) also provides guidance on the amount of time to be spent on the core knowledge (70%) and on the extension of this knowledge to relevant contexts (30%) (cf. Chapter 8, Section 8.2.1.1).

The first workshop activity in Booklet 3 (SHC R&D, 2003:5-8) required the booklet trainer and the participants to reflect on the role of the trainer. This activity highlighted the dual responsibility of the SHC R&D consultant as a booklet trainer and as an English language teacher. The intention of this activity was that teachers would come to realise their dual responsibility for teaching the content of their learning areas as well as the English language that their learners needed to understand the content. The example of the Natural Sciences lesson plan for Grade 4 learners (cf. Appendix S) illustrated how this dual responsibility could lead to the creation of content variety through careful planning and pacing of the activities.

In the lesson, learners are required to investigate and construct scientific knowledge by comparing the properties of various liquids (Introductory Activity) and by analyzing a variety of objects that needed water (Activity 1). Learners then have to write down the uses of water for each of the objects in the picture that required water. Learners conduct a word search in an English crossword puzzle (Activity 2) to find key content vocabulary indicating the different sources of water. Learners then have to find their own pictures in magazines to match the identified sources of water and make their own collage. Learners finally explore the relationship between science, society, and the environment in group discussions about how water could be kept clean.

Conclusion

The above analysis provides evidence that the Natural Sciences lesson plan (cf. Appendix S) illustrated how teachers could provide content variety in the core and broader knowledge areas related to Natural Sciences. In addition, the example illustrated how teachers could apply second language learning and teaching

strategies. This particular example illustrated the mnemonic strategy (Oxford, 2002:167) of locating words in an English crossword puzzle.

However, a basic explanation or guide on how the content variety was achieved did not complement the practical example in the Natural Sciences lesson plan (cf. Appendix S).

Assessment and Recording of Learner Performance During the Learning Experience

Teachers expressed the need (cf. Table 3) to develop their knowledge and skills in the application of continuous assessment and recording of learner performance during a lesson.

McNamara (1996:1) points out that performance assessment has replaced more traditional pencil and paper tests involving multiple choice questions. The driving force behind these changes has been government policy which increasingly requires performance-based assessment in all areas of education. The National Curriculum Assessment Guidelines for General Education and Training in the Natural Science for the Intermediate and Senior Phase (cf. DoE, 2007b) illustrate McNamara's (1996:1) observation. According to these guidelines (DoE, 2007b:1), assessment is defined as "a process of making decisions about a learner's performance. It involves gathering and organizing information (evidence of learning), in order to review what learners have achieved."

The National Curriculum Assessment Guidelines for Natural Sciences (DoE, 2007b:26) provides an example of a performance-based assessment task at Grade 6 level. This task assesses learners' investigation of water quality. Although the example links the learning and assessment activities, it does not provide actual examples of assessment instruments to be used during the learning experience.

The Natural Sciences lesson plan in the English as LoLT Course (cf. Appendix S) provided three examples of checklists to assess learners' competence in the activities performed. An example of how to assess and record learner output in each activity during the lesson was provided. However, the link between the checklists, the assessment standards and the learning outcomes could have been indicated to further develop teachers' skills in performance-based assessment.

The National Curriculum Assessment Guidelines for Languages (DoE, 2007c:13) indicate that a simple checklist may be used to assess learners' performance in

informal daily assessment tasks. The checklist for Activity 2 (cf. Appendix S) assessed learners' fluency in reporting back to their small-groups. Nunan (2004:161) identifies fluency as one of the criteria for assessing task-based performance. However, Nunan (2004:141) acknowledges the difficulty of setting up and controlling performance-based assessment, particularly the assessment of speaking. The example (cf. Appendix S) did not include any level descriptors of the Grade 4 learners' fluency in their oral feedback on the uses of water. This omission increased the difficulty of the assessment activity and decreased its validity.

Conclusion

The example of the Natural Sciences lesson plan (cf. Appendix S) provided an example of how to assess learner performance throughout the lesson. However, the level descriptors to assess learners' fluency in a small-group feedback session were omitted.

8.2.1.3 Overall Planning and Organisation of OBE Learning Experiences

Many of the descriptive evaluations made about the responses of the English as LoLT Course to teacher's needs in doing single lesson plans, presentations, and assessments apply to teachers' overall OBE teaching practice needs. The overall implementation scope of OBE and English as LoLT teaching strategies requires, however, additional descriptions in the evaluations of the course response to teachers' identified needs (cf. Table 3).

Conclusions about the course response to the tension between OBE and classroom practices appear at the end of this sub-section.

The Overall Development of Teachers' Knowledge and Skills in OBE Planning, Methodology and Assessment

In response to this encompassing need identified in the needs assessment phase of the study (cf. Table 3), the English as LoLT Course content provided and modelled examples of OBE planning, methodology, and assessment in learning experiences (cf. Appendix T).

Booklet 7 (SHC R&D Course Participant File, 2003:31-40) provided examples of how to develop a unit consisting of a series of lessons in a particular learning area. The course therefore responded to the broader interpretation of a lesson plan in the Teacher's Guide for the Development of Learning Programmes in Natural Sciences (cf. DoE, 2003c:2) as groups of linked activities (cf. Section 8.2.1.1).

In addition, the English as LoLT Course created opportunities to develop teachers' skills in task-based language teaching. Nunan (2004:4) defines this strategy as "a piece of classroom work that involves learners in comprehending, manipulating, producing and interacting in the target language...". He adds that "the task should also have a sense of completeness, being able to stand alone as a communicative act in its own right with a beginning, middle and an end".

The course focused on the development of a variety of language activities to support the content in a series of learning area lessons (SHC R&D Course Participant File, 2003:31-40). Harmer (2004:127) warns against boredom as a result of a lack of variety in language learning. Van der Walt (2006:49) explains that variety means involving learners in a number of different types of activity and introducing them to a wide selection of materials (cf. Section 8.2.1.2). He emphasises the importance of planning to ensure that classes are always interesting and never boring or monotonous.

The English as LoLT Course provided opportunities to the participants to develop their skills in planning and developing a variety of language activities to support content learning (cf. Appendix X). The course content also created opportunities for the development of their skills to analyse the needs of language learners to cope in a specific academic context. These identified needs would inform focused lesson planning. This forms the basis for relevant material development. Hamp-Lyons (cf. 2002:126-130) states that the development of own materials should be an attractive proposition for teachers. The English as LoLT Course material provided examples of how to use games, exchange tables, dialogues, and songs in the various learning areas. Each language activity type had a title, a detailed description of the methodology, an example of the activity, and a suggested assessment activity. Participants had opportunities to reflect on the examples provided during the workshops. In addition, they had to apply their knowledge and skills in Assessment Activity 3 of Booklet 7 (SHC R&D Course Participant File, 2003:41). They were required to develop their own language learning activities to support content learning.

Meaningful Inclusion of Skills, Attitudes and Values in the Learning Experiences

The English as LoLT Course content modelled the meaningful inclusion of skills, attitudes, and values from the onset. Booklet 1 (SHC R&D Course Participant File, 2003: 6) started with a workshop activity that explored programme participants'

attitudes towards using English as a language of learning and teaching (Appendix W) (cf. Ellis (1994:198), who highlights the important role of attitude in language learning).

In addition, the course introduced participants to the skill of building their own vocabulary to facilitate their development in English as LoLT teaching strategies as well their communicative competence in a wider range of contexts. The participants were required to compile their own glossary of difficult English words which were printed in bold type throughout the course (cf. Appendix T).

The first assessment activity introduced participants to the skill of using surveys to develop their action research skills. They had to find out how their colleagues and their community valued the status of English as the LoLT. The course thus illustrated the use of Learning Outcome 5 of the Languages learning area (Teacher's Guide for the Development of Learning Programmes in Languages (2003:21). This outcome states that the learner will be able to use language to think and reason, and access, process and use information for learning. The development of learning and teaching strategies to realise this outcome formed the core focus of the English as LoLT Course (cf. Appendix T).

The Development of Standardised Planning Formats

The English as LoLT Course created an opportunity for teachers to develop standardised planning formats through co-operative and collaborative learning (cf. Killen, 2000:100) Workshop Activity 5 in Booklet 3 (SHC R&D Course Participant File, 2003:30) required the programme participants to analyse and reflect on the suggested planning format. They had to discuss the planning format in small-groups during the workshop. The programme participants also had to present the planning format to their colleagues during the Professional Working Group meetings where the Intermediate and Senior Phase teachers would be expected to develop standardised planning formats based on their refinement of the example provided in the course (cf. Appendix S).

The Effective Application of the Continuous Assessment OBE Policy

The Revised National Curriculum Statement Grades R – 9 (DoE, 2002:115-120) clearly describes the characteristics of continuous assessment as an ongoing activity that supports the growth and development of learners through regular and positive feedback. Continuous assessment allows for integrated assessments that combine assessments of various learning outcomes or different assessment methods. In

addition, continuous assessment allows for summative assessment as the accumulation of the results of continuous assessment to provide an overall picture of a learner's progress at a given time.

The English as LoLT Course methodology modelled how teachers could apply the continuous assessment policy. Programme participants had to keep a record of their assignments as evidence of formative assessment in a portfolio. (The comments of the SHC R&D assessment team on the participants' portfolios would create opportunities for them to develop their knowledge and skills in using English as the LoLT and to develop their own English usage. These qualitative comments in the portfolios would serve a formative evaluation goal.)

The Revised National Curriculum Statement Grades R – 9 (DoE, 2002a:115) does not provide guidance on the use of assessment strategies, except to say that “the choice of what assessment strategies to use is a subjective one, unique to each teacher, grade and school, and dependent on the teacher's professional judgement.”

The English as LoLT Course provided examples of continuous assessment strategies and techniques in the assessment portfolio of each booklet. In addition, the emphasis on self and peer-assessment activities in the course and during professional working group meetings reinforced reflective practice as a core assessment strategy in the course methodology.

Organisation of Teachers' Files

The course outline in the SHC R&D Course Participant File (2003:12) indicated that the development of teachers' file management skills would receive focused attention throughout the course implementation process. The English as LoLT Course curriculum allocated 5% of the formative assessment marks to the organisation of participants' files.

Confidence to Implement OBE Teaching Practices

According to Killen (2000:xv), learners' “learning experiences will directly influence their motivation and also their future learning strategies”. The content of the workshop and assessment activities in the English as LoLT Course created opportunities for developing teachers' knowledge of and skills in how to apply OBE principles to their classroom practices (cf. Appendix T). Booklet 4 (cf. Appendix T) applied, for example, the OBE principle of lifelong learning to language learning and modelled its application through co-operative learning and reflective practice.

In addition, the course developers attempted to ensure that the level and scope of the course content would remain at the appropriate level through the creation of continuous assessment activities to monitor participant output (cf. Appendix I). Repeated exposure to OBE planning, methodologies, and assessment was intended to increase teachers' confidence to apply their OBE knowledge and skills (cf. Appendix T).

Ellis (1994:515) suggests that learners' motivation is strongly affected by their achievement. The English as LoLT Course methodology would also provide support to teachers in applying OBE policies to their classroom practices. The course methodology included mentoring sessions at the schools. There the course facilitator would provide hands-on support to teachers in their own learning and teaching contexts.

Conclusion

The above discussion provides evidence that the English as LoLT Course responded to the need for improving planning and organisation of OBE learning. The course curriculum created opportunities to develop teachers' skills in: planning for a series of lessons; applying task-based language teaching; developing a variety of language activities; using a wide selection of materials; building English content vocabulary; applying co-operative, collaborative and lifelong learning; implementing continuous assessment, especially portfolio-based assessment; and in organising and using their files as learning and teaching resource material.

8.2.1.4 Learner Output and Homework

Development of the Quality and Quantity of Learner Output

According to Swain's (cited in Nunan, 2004:80) output hypothesis, learners need opportunities to produce the target language in addition to the input they receive in content-based education. The simplified planning format in Booklet 3 (SHC R&D Course Participant File, 2003:29-36) provides an example of course guidelines on the development of learner output. A qualitative and quantitative analysis of this example is presented below.

During the introductory activity, learners were required to write single words in a table. The words described the colour, shape, feel, and smell of three liquids. Learners had to write the names of objects that required, and did not require water in the first activity of the lesson. They were then requested to write down the uses of

water next to the objects that required water in full sentences. Opportunities for oral learner output would be provided in the subsequent brainstorming session and in feedback from different groups on the different uses of water.

During the second activity, learners were required to search for and circle the words indicating the different sources of water. They would then produce a collage of pictures that matched the words for the different sources of water. After group discussions, they had to write down places where water could be found. An opportunity for oral learner output would also be provided in group discussions on how water could be kept clean.

The writer as researcher counted the number of opportunities provided in the lesson plan to develop the quality of learner output. The Natural Sciences lesson plan (cf. Appendix S) provided twelve opportunities to develop this. Learners received four opportunities to write down single words and one opportunity to write in full sentences. They furthermore had four opportunities for oral output, one opportunity for word recognition and two opportunities for visual literacy. The lesson plan therefore demonstrated how to create many opportunities to develop learner output. The quality of the learner output was determined by the variety and appropriate level of activities provided.

In addition, Booklet 6 (SHC R&D Course Participant File, 2003: 23-36) focused on how to create opportunities for learners to produce and practise the words and phrases used in their lessons. Booklet 8 (SHC R&D Course Participant File, 2003: 5-24) provided a summary of strategies and techniques to develop the quality of learner output (cf. Appendix V). The menu provided in the summary furthermore ensured that teachers could create many opportunities for their learners to develop the quality of their oral and written output throughout the learning experience.

Development of Teachers' Skills to Monitor Learner Output Effectively

The quality of learner output is enhanced through the effective monitoring of learner output (cf. Scrivener, 2005:93-4). Seville-Troike (2006:20) points out that feedback facilitates language learning. The simplified lesson plan in Booklet 3 (SHC R&D Course Participant File, 2003:35) provided examples of three checklists to monitor learners' written responses to the three activities of the learning experience.

The assessment activities of each booklet in the English as LoLT Course (cf. SHC R&D Course Participant File, 2003) furthermore modelled monitoring of programme

participants' oral and written responses. The external monitoring of teachers' interviews in Booklet 4 (SHC R&D Course Participant File, 2003: 22-23) would, for example, be conducted according to an assessment grid (cf. Appendix E). This assessment grid differentiated between three levels of learner performance. Guidelines for the monitoring of learner output therefore served a dual purpose. The quality of learner output would be monitored and learners would receive guidance on how to prepare their oral responses.

The assessment activities also provided guidelines to programme participants on how to structure their essays. Fourteen steps were provided as guidelines from Booklets 5 – 8 in the section called: "Putting it all together" (cf. Appendix T). These steps guided the monitoring process of the programme participants as well as the SHC R&D assessment team.

The Creation of an Enabling Context for Learners to Do Their Homework

Harmer (2004:338-9) views homework as essential. He points out that homework should preferably be negotiated with learners to avoid unrealistic tasks which could lead to frustration and boredom. Mafisa's (cf. 2001) study suggests that learners should keep journals or diaries of their learning experiences. Ten minutes could also be set aside on a Friday afternoon to reflect on the homework and to allocate "learning points" to the homework.

The planning activities in The English as LoLT Course material highlighted the importance of homework. The simplified planning format in Booklet 3 (SHC R&D Course Participant File, 2003:36) included a section on homework. In addition, Booklet 7 (SHC R&D Course Participant File, 2003: 38-39) presented examples of how to include homework in a unit of lessons.

Conclusion

The above analyses provide evidence that the English as LoLT Course focused on the importance of learner output and homework in OBE and second language learning and teaching. The course provided opportunities to develop teachers' skills in paying attention to learner output throughout a lesson and in developing the quality of learner output through regular practice, monitoring and positive feedback. In addition, the course emphasised the importance of homework by including a section for it in the lesson planning template (cf. Appendix S).

However, the course did not provide detailed examples of homework that could guide teachers in the development of realistic, relevant and interesting homework activities. The course did not require teachers to discuss the formal allocation of time for homework after school in their professional working groups and with the school management teams (SMTs).

8.2.2 English Language Learning and Teaching

The descriptive analysis of this evaluation theme focuses specifically on whether, and how, the English as LoLT Course curriculum responded to teachers' and learners' English language learning needs. The analysis therefore offers predominantly qualitative descriptions of language learning and teaching strategies, with a specific focus on English as the LoLT. The analysis is informed by relevant research literature in SLA theory, and is presented according to teachers' needs identified during the needs assessment phase (cf. Table 3).

8.2.2.1 Increased Learner and Teacher Exposure to English in the Learning and Teaching Context

The significance of increased exposure to the target language in second language acquisition is argued in Krashen's input hypothesis (cf. Krashen, 1982). *Exposure* is a very broad term. The writer used the term *exposure* to refer to the opportunities provided in the course curriculum for developing teachers' skills in using English in a learning area, as well as in classroom and in whole-school routines (cf. Appendix V).

Booklet 3 (SHC R&D Course Participant File, 2003:11-23) focused, for example, on the introduction of English content vocabulary in each of the eight learning areas. The content material offered examples of content vocabulary in each learning area (SHC R&D Course Participant File, 2003:11-12). The course also provided examples and guidelines in using English instructions and questions vocabulary (cf. Appendix V).

These language learning strategies form part of content-based instruction (CBI). Peachy (2007) describes CBI as a process where learners learn about a subject using the language they are trying to learn, rather than their native language, as a "tool for developing knowledge". He concludes that learners develop their linguistic ability in the target language through CBI. According to Snow (2005:708), teachers in primary schools need to be both language and content teachers in order to practise integrated content and language instruction. Teachers therefore need training that

allows them to plan and deliver instruction that would provide learners opportunities to increase their academic literacy.

As previously mentioned (cf. Section 8.2.1.2.), the English as LoLT Course curriculum provided programme participants an opportunity to conduct a survey in Booklet 3 (SHC R&D Course Participant File, 2003:25-27). This survey would establish whether, and how, teachers used English instruction and question vocabulary in their learning areas (cf. Appendix U). This method also illustrated task-based learning and teaching (cf. Ellis, 2004b; Nunan, 2004). The course created opportunities for developing participants' skills in using English key content vocabulary, question and instruction phrases in their lesson plans. An example of a Natural Sciences lesson plan was used in Booklet 3 (SHC R&D Course Participant File, 2003:29-36).

In addition, Booklet 7 (cf. SHC R&D Course Participant File, 2003:9) presented opportunities for the development of teachers' skills in using English in their daily classroom and whole-school routines. The course interpreted the term *routine* in the general sense as *regularity of procedure* (cf. Collins Dictionary & Thesaurus, 2004:474) and in the linguistic sense as a *type of formulaic speech* (cf. Ellis, 1994:722). *Routines*, according to Ellis (1994:722), are units that are totally unanalysed and which are learnt as wholes. He cites "I don't know", as a common example of a language routine. The following example in Booklet 7 (cf. SHC R&D Course Participant File, 2003:9) illustrates the integration of the general and specific interpretations of the term *routine* in the course. The participants were required to complete a mix-match activity where examples of general whole school routines were to be matched with examples of formulaic speech. The following match serves as an example. A whole school routine required teachers and learners to greet one another when they met for the first time in any day. The matching formulaic speech was the following English greeting and response: "Good morning. How are you?". "I am fine. Have a nice day".

8.2.2.2 The Development of Effective Strategies in Concept Formation

Richards, Platt and Platt (1992:74) define a concept as the general idea or meaning that is associated with a word or symbol in a person's mind. Concepts are the abstract meanings that words and other linguistic items represent. Linguists believe that all languages can express the same concepts, although some languages may have fewer words for some concepts than are found in other languages, or they may distinguish between concepts differently.

Lambani's (2001) study clearly illustrates that many learners in our schools do not have an adequate understanding of new concepts in English that are used in their learning areas. The course therefore attempted to teach teachers the necessary strategies to inculcate these concepts.

Oxford (1990:14) classifies learning strategies as direct and indirect. According to Oxford (1990:37), direct strategies are language learning strategies that directly involve the target language. Oxford (1990:38) identifies three groups of direct strategies, namely memory, cognitive and compensation strategies. On the other hand, indirect strategies (Oxford, 1990:135) are language learning strategies that support and manage language learning without directly involving the target language. Oxford (1990:136) identifies three groups of indirect strategies, namely meta-cognitive, affective and social strategies.

The first dialogue in Booklet 5 (SHC R&D Course Participant File, 2003:6) illustrated how a baby learnt the new word *ball* in a communication between a mother and her eighteen-month-old baby. The dialogue illustrated the following memory language learning strategies (Oxford, 1990:39) to help learners store new information and to retrieve it later. The baby created mental linkages by associating the visual image of a ball with new language information. The baby also remembered the new word *ball* according to its sound. The mother placed the new keyword *ball* into a context by using short, meaningful sentences. The mother smiled and gave the ball to her baby. The baby responded by throwing the ball to the mother. The dialogue illustrated employing action as a memory strategy by using physical response. The concrete object of the ball was passed between the mother and her baby. The dialogue also illustrated the creative use of mechanical techniques by moving the ball as a concrete object to remember the new language information.

In addition, the first dialogue in Booklet 5 (SHC R&D Course Participant File, 2003:6) illustrated the following cognitive language learning strategies (Oxford, 1990:44) to enable learners to understand and produce new language. The mother repeated the new keyword *ball* fifteen times in the dialogue. The baby practised the keyword by repeating it seventeen times. The word *ball* was also recombined to practise its use. The mother recombined the use of the word *ball* as follows: "Throw me the ball. Throw the ball. Throw the ball to me (*holds out her hand to receive the ball*)." In addition, the mother and baby practised the use of the new keyword in the natural setting of throwing and catching a ball.

The second example was a short conversation between a mother and her four-year-old child about milk that he had during a visit to his grandmother (SHC R&D Course Participant File, 2003:8). The dialogue highlighted the following memory language learning strategy (Oxford, 1990:39). The mother related the adjectives *fresh* and *sour* to the concept *milk* that was already in the child's memory. The child created new associations in his memory through elaborating an existing concept.

The dialogue emphasised the use of repetition as a cognitive language learning strategy (Oxford, 1990:45). The child used "seed" instead of "saw" when he told his mother that he had seen his grandmother: "I seed her." His mother repeated the sentence, providing the correct form of the verb: "...You saw your granny today." The child therefore practised the formation of the correct form of the verb through repetition.

In addition, the second dialogue (SHC R&D Course Participant File, 2003:8) illustrated the following compensation strategy (cf. Oxford, 1990:49-51) to enable the child to produce new language despite limitations in his knowledge. The child couldn't remember the adjective *fresh* when he wanted to explain that his granny was very upset because she wanted to drink more fresh milk. He then explicitly asked his mother for help: "What is it again?" The mother replied: "Fresh milk".

The third dialogue (SHC R&D Course Participant File, 2003:8) illustrated how two four-year-olds assisted each other to form their concept of peanut butter. The dialogue emphasised the creation of mental linkages with the concept *peanuts*. The following rhyme also created auditory links with the word *peanuts*: "Peanut, seanut, weanut, deanut. You're a deanut!" The children further created mental linkages by using the new phrase *peanut butter* in the context of having peanut butter on their sandwiches. These memory language learning strategies (Oxford, 1990:40-43) were complemented by the cognitive language learning strategy of naturalistic practising (Oxford, 1990:45). The new concept was practised by the two four-year-olds in their conversation about what they were having on their sandwiches.

The workshop activities in Booklet 5 (SHC R&D Course Participant File, 2003:6-10) provided programme participants opportunities to identify ways in which children learn new words, using the three dialogues as bases for discussion. The course then provided a list of guidelines that teachers could apply to develop their learners' content vocabulary. The guidelines were based on the language learning strategies presented in the dialogues. Booklet 5 (SHC R&D Course Participant File, 2003:12)

provided the following guidelines: use visual clues to help with new language; praise learners for their language efforts; repeat new language for learners and encourage them to repeat it; give learners alternative words and phrases; help learners correct their language mistakes by repeating what they said correctly; give learners many opportunities to speak and listen to what they say; build the language confidence of learners by allowing them to make mistakes; try to speak in short and simple sentences to the learners; and extend what the learners say by asking questions.

The above-mentioned language learning strategies further highlight the inclusion of indirect strategies (Oxford, 1990:136) to support and manage language learning. The affective strategies (Oxford, 1990:141) regulate learners' emotions, motivations and attitudes. This purpose corresponds with Krashen's (cf.1982) affective filter hypothesis. Learners with a low affective filter (Krashen, 1982:32) would be more successful in second language acquisition than learners with a high affective filter who have a high level of personal and classroom anxiety.

The dialogues in Booklet 5 (cf. SHC R&D, Course Participant File, 2003:6-10) illustrate the following affective learning strategies: praise learners for their language efforts and build the language confidence of learners by allowing them to make errors.

Booklet 5 (SHC R&D Course Participant File, 2003:13) linked the above-mentioned language learning strategies to develop concept formation in the learners' home language to English as their first additional language and to English as the LoLT. Three comic strips illustrated classroom practices for learners' language development. The assessment activities created opportunities for teachers to apply and reinforce the language learning strategies that they would learn during the workshop activities.

In addition, the essay topic introduced at the end of Booklet 5 (SHC R&D Course Participant File, 2003:26) provided an opportunity for teachers to continually reflect on their classroom application of skills used in home language acquisition to develop learners' proficiency in English.

8.2.2.3 The Development of Effective Strategies in Concept Transfer from the Home Language to the LoLT

Odlin (1989:4) emphasises concept transfer as a very important factor in second language acquisition. Cook (2000:1) refers to the fact that the word *transfer* is

generally used in second language acquisition theory to describe the relationship between two languages in the same mind. Cook (2000:2) therefore defines *transfer* as “relationships within a single mental system”. Cook (2003:2) further extends the complexity of this relationship to include multi-competence: “knowledge of two or more languages in one mind”. The relevance of these definitions lies in how the English as LoLT Course used the relationship between learners’ home languages and English in the multilingual learning context of the 4 IDDP schools. Many Grade 4 learners, as well as their teachers, had some knowledge of more than two languages “in their minds”.

The English as LoLT Course illustrated to the participants how to use this relationship between the home language(s) and English as the target language (cf. Appendix T; Appendix V). Participants learnt to develop learners’ basic interpersonal communication skills and their cognitive academic language proficiency (Cummins, 1997:57) in SeSotho as well as in English. The course highlighted the importance of learners’ home language in conceptual transfer. Booklet 5 (cf. SHC R&D Course Participant File, 2003) is called: *Never underestimate the value of home languages* (cf. Appendix T).

Odlin (2005:17) stresses the important influence of the home language on the target language and the reverse in his review on cross-linguistic influence and conceptual transfer. Odlin (2005:17) concludes that learners often become highly successful users of the target language whether or not they can “fully succeed in overcoming the influence of L1 (or perhaps L2 in the case of L3 acquisition”. He adds that learners’ success in acquiring the target language can influence the use of their native language. Booklet 2 (SHC R&D Course Participant File, 2003:11) firstly developed teachers’ knowledge and skills of how to use learners’ basic interpersonal communication skills (BICS) in their home language in order to develop their English BICS (cf. Cummins, 1997). Booklet 2 (SHC R&D Course Participant File, 2003:11) presented a rural SeSotho-speaking boy who learnt English basic interpersonal communication skills (BICS) in an informal context when he visited his cousins in Johannesburg. He listened to a conversation between his cousins while he watched them playing a game of marbles.

The first assessment activity (cf. SHC R&D Course Participant File, 2003:13-15) required teachers to use the linguistic cues that Mpho implicitly received from the immediate communicative context to support the acquisition of learners’ English

BICS in the classroom. The activity emphasised the importance of developing learners' listening, speaking, reading and writing skills to develop their BICS.

Booklet 2 (SHC R&D Course Participant File, 2003:16-21) then provided examples on how to develop learners' cognitive academic language proficiency (CALP) in the formal context of the classroom. Gibbons (cited in Cummins, 1997:56) refers to contextualised language as *playground language* and to decontextualised language as *classroom language*. Booklet 2 is called: *Children need playground language and school language* (cf. Appendix T).

Booklet 2 (SHC R&D Course Participant File, 2003:18-19) emphasised the ideal that every Intermediate Phase teacher should take responsibility for developing their learners' CALP (cf. Cummins, 1997:57). Teachers were reminded to continue developing their learners' English BICS in order to build their English CALP.

In addition, Booklet 2 (SHC R&D Course Participant File, 2003:19) provided examples of how to develop learners' listening, speaking, reading, and writing skills in their English CALP. Strategies to support learners' understanding of the concept of fractions in Mathematics were described in this booklet (SHC R&D Course Participant File, 2003:20).

Booklet 8 (SHC R&D Course Participant File, 2003:5-24) included a description of code-switching as a language learning strategy (cf. Appendix V). Ellis (1994:28) views code-switching as a communicative process: "the alternative use of the L1 and L2 within a discourse is a process which involves L1 for purposes of communication." However, Ellis (1994:28) views concept transfer as a learning process which is distinct from the use of code-switching in a communicative process. He explains his viewpoint as follows: "L1 transfer usually refers to the incorporation of features of the L1 into the knowledge systems of the L2 which the learner is trying to build. It is important to distinguish this learning process from other processes which involve the use of the L1 for communication". Concept transfer is therefore a learning process, whereas code-switching is a communicative process.

Candlin (cited in Dreyer, 1992:48) states that "communication, learning, and instruction interact and influence each other". According to Oxford (1990:243), the argument that communication strategies cannot also be learning strategies is inaccurate because learning often results even if communication is the main goal. Oxford (1990:44) identifies the strategy of transferring knowledge of words,

concepts, or structures from one language to another in order to understand or produce an expression in the new language as a direct language learning strategy.

Complementary to the language acquisition approach, which focuses more explicitly on cognitive language learning strategies, the course emphasised language learning as a participation metaphor. The participatory approach to language learning shifts the focus from language structure to language use in context, and to “issues of affiliation and belonging” (Pavlenko & Lantolf, 2000:155). Candlin and Mercer (2000:7) interpret *context* in language learning as dynamic: “dependent in the classroom on the careful constructing by the teacher of a continuity and a community of shared understanding with learners”. The course emphasised the development of learners and teachers’ participation in the development of English BICS to construct the social context and culture of their classrooms for participatory language learning.

8.2.2.4 The Development of English Teachers’ Skills in Communicative Language Teaching

The national Department of Education (DoE, 2003a:28-9) has provided guidelines to teachers on Communicative Language Teaching (CLT) for the development of their Grade R – 9 learning programmes in languages. The department also acknowledges the essential role of grammar in the teaching of additional languages. The department states that “the most effective way to teach Additional Languages is to combine a communicative approach with the teaching of language structures. This enables language structure to be taught in context and allows attention to be paid to meaning as well as form” (DoE, 2003a: 29).

This interpretation of CLT is a commonly shared view. Littlewood (cited in Richards & Rodgers, 2001:155) comments: “one of the most characteristic features of communicative language teaching is that it pays systematic attention to functional as well as structural aspects of the language.”

Galloway (1993:1) explains that CLT makes use of real-life situations that necessitate communication. He emphasises the importance of using language in its linguistic and its social or situational context. This explanation ties in with some of the objectives of CLT (cf. Richards & Rodgers, 2001:162-3; SIL International, 1999). These objectives are: students will learn to use language as a means of expression; express the functions that best meet their own communication needs and use language as a means of expressing values and judgments.

Thompson (1996:9-15) defines some of the characteristics of CLT by distinguishing four misconceptions about CLT. These misconceptions are that CLT means: not teaching grammar; teaching speaking only; using pair work to do role play only and expecting too much from the teacher. CLT is therefore characterised by an exploration of the grammatical forms used to convey the meaning of a text and by a combination of oral and written communication with text and with persons. Pair work can alternatively be used as a preparation for learner contributions to solve problems, analyse new language structures in a text, prepare a questionnaire for the class, etc. Teachers facilitate learners' functional communication and social interaction activities through responsive listening and classroom management skills.

The features of CLT described above are not overtly mentioned in the Policy for First Additional Languages in the Revised National Curriculum Statement for Grades R-9 (DoE, 2002b:6) and in the Norms and Standards for Educators (DoE, 2000a). However, the language policy includes Learning Outcome (LO) 6, which deals with grammar as a core aspect of language knowledge in texts. The language policy also emphasises the importance of integrating listening (LO 1), speaking (LO 2), reading and viewing (LO 3), writing (LO 4), thinking and reasoning (LO 5) and knowledge of language (LO 6). The active participation of learners as problem solvers, communicators, and team players is part of the critical outcomes in OBE to ensure a learner-centred and activity-based approach to education. The teacher is required to facilitate or mediate, as well as to manage learning in OBE. Communicative language teaching is not only aligned to the overall and language specific OBE policies, but forms an integral part of language learning in OBE.

The practical illustration of this language teaching approach and departmental policies on CLT formed an integral part of the English as LoLT Course content and methodology (cf. Appendix T; Appendix V). CLT was not specifically mentioned in the course material, but it was demonstrated in the course methodology. The workshop and assessment activities required active learner participation and responsive facilitation of language learning. The course material provided many examples of case studies, illustrations, comprehension texts, questionnaires, role plays, grammatical exercises, games, songs, and dialogues to promote functional communication and social interaction activities.

For example, Booklet 6 of the course (SHC R&D Course Participation File, 2003:5-36) presented participants with opportunities to learn how to develop their learners' receptive and expressive skills. Assessment Activity 1 of the course (SHC R&D

Course Participation File, 2003:14-17) required teachers to design a receptive language game that tested their learners' understanding of prepositions. The rubric used to assess the language game provided clear guidelines, with level descriptors, for the development of the game. The course also provided programme participants with an example of a listening game (SHC R&D Course Participant File, 2003:9-11) and an example of a reading and listening game (SHC R&D Course Participant File, 2003:11-13).

The final section in Booklet 6 (SHC R&D Course Participant File, 2003:32-36) illustrated the combination of listening, speaking, reading, and writing skills in a lesson on 'Communication'. The lesson addressed the real-life situation of discussing how far learners live from the school. Teachers had to identify and explain the use of receptive and expressive language in four excerpts from the lesson during a workshop activity.

8.2.2.5 The Development of Teachers' Language Usage in the LoLT

According to Anderson (2005:767), "understanding and controlling cognitive processes may be one of the most essential skills that classroom teachers can develop in themselves and the students with whom they work". The second sentence in the first paragraph of Booklet 1 (SHC R&D Course Participant File, 2003:4) reads as follows: "One of the most important things that any teacher has to think about is language and how it is used in the classroom".

The above emphasis on thinking about language learning is defined as *meta-cognition* in second language strategy research. Anderson (2005:767) defines meta-cognition as "the ability to make your thinking visible. Meta-cognition results in critical but healthy reflection and evaluation of your thinking that may result in making specific changes in how you learn". Oxford (1990:136) describes the meta-cognitive strategy as an indirect language learning strategy that provides "learners with a way to coordinate their own learning process". Each booklet in the English as LoLT Course (cf. SHC R&D Course Participant File, 2003) provided programme participants opportunities to plan, monitor and review their learners' as well as their own language learning progress (cf. Appendix T).

The English as LoLT Course created opportunities for teachers to explore language learning as well as language use strategies. For example, Booklet 1 (SHC R&D Course Participant File, 2003:16) highlighted the key role of the teacher in finding ways (strategies) to help their learners learn English. Booklet 1 (SHC R&D Course

Participant File, 2003:16) further singled out the development of teachers' own language usage: "One way is to make sure that teachers keep learning English, and use it as best they can".

The emphasis in this sub-section of the English language learning and teaching evaluation theme is therefore on whether, and how, the course developed teachers' usage of English as the LoLT. The course emphasis on co-operative and on collaborative learning (cf. Section 2.1.2) provided teachers opportunities to identify and to develop the application of the strategies to themselves and to their learners. Anderson (2005:762) cautions researchers and teachers that "there are no good or bad strategies; there is good or bad application of strategies". He then reviews the application of L2 strategy research within the listening, speaking, reading, writing and *grammarising* skills (cf. Anderson, 2005:764-766).

The English as LoLT Course created opportunities for the development of teachers' own listening, speaking, reading, writing and *grammarising* skills while they were exploring how to develop their learners' language learning and use strategies (cf. Appendix V). In addition, teachers had to develop their own and their learners' strategies in using English as the LoLT. According to Carkin (2005:89), the variety of strategies students employ to comprehend texts and lectures, as well as those used to produce academic texts, are associated with academic success.

Booklet 1 (SHC R&D Course Participation File, 2003: 26-31) highlighted the importance of identifying key words in order to access the meaning of texts. Teachers would use excerpts from the language policies to identify the key words. The course content and methodology emphasised the usefulness of identifying key words in order to study and organise information. Booklet 2 (SHC R&D Course Participant File, 2003:27-29) created opportunities for teachers to develop their skills in using key words to write a paragraph on the characteristics of BICS and one on the characteristics of CALP. They would then use self-assessment criteria to improve the quality of their paragraphs before they would submit the paragraphs to the SHC R&D assessment team.

Carkin (2005:91) claims that the process-oriented approach to writing emphasises personal and expressive writing "at the expense of skills and attitudes needed by academically bound ESL students with limited and linguistic repertoires". However, the English as LoLT Course created opportunities for teachers to produce a logically structured and focused essay on language learning strategies through scaffolding.

Booklet 5 (SHC R&D Course Participant File, 2003: 25) introduced the process-writing process to teachers. It consisted of 14 steps that would be followed from Booklet 5 to Booklet 8. Scrivener (2005:162) defines scaffolding as the way a competent language speaker helps a less competent one to communicate by both encouraging and providing possible elements of the conversation. The English as LoLT Course (cf. SHC R&D Course Participant File, 2003) used scaffolding to offer development opportunities for programme participants' oral and written output (cf. Appendix V).

The English as LoLT Course furthermore offered teachers grammar explanations and exercises. Booklet 4 (SHC R&D Course Participant File, 2003:34-37) provided the participants explanations and exercises on pronouns; Booklet 5 (2003:29-37) on prepositions; Booklet 6 (SHC R&D Course Participant File, 2003:41-46) on adjectives and Booklet (2003:45-52) on collective nouns and on the simple present and the present continuous tenses. The grammar exercises would be assessed by the teachers themselves. Programme participants would constantly check their written output in the assessment activities for the correct use of tenses, spelling and punctuation. The assessment activity in Appendix U of this study serves as an example.

Mafisa's (2001) study indicates that many teachers lack grammatical competence in English. In addition, Ellis (1994:703) highlights the danger of fossilization in language learning: "...most of the learners fail to reach target-language competence. That is, they stop learning while their internalised rule system contains rules different from those of the target system". Cook (1991:9) confirms the importance of grammar in language learning: "Knowledge of grammar is thought by many to be the central area of the language system. However important the other components of language, they relate to each other through grammar." Grammatical ability also forms an important component of Bachman's (1990) influential model of language ability.

The question arises whether the English as LoLT Course paid attention to developing teachers' *grammarising* strategies despite an emphasis on the accurate use of English grammar previously described in this section (cf. Appendix U). Ellis (cited in Anderson, 2005:766) suggests that, for input to become intake, *noticing* is the necessary condition. Focusing learners' attention on specific aspects of grammar is the pedagogical strategy to get learners to learn grammar. Ellis (1994:703) explains that formal instruction involves some attempt to focus learners'

attention on specific properties of the L2 so that they will learn them. He adds that different types of formal instruction can be distinguished, including inductive (where learners are provided with structural input designed to help them learn a rule or item) and deductive (where learners are given explicit information about a rule or item).

Conclusion

The above descriptive analysis of the English as LoLT Course response to teachers' needs identified in English language learning (cf. Table 3) leads to the following conclusions.

The course curriculum provided teachers with specific language learning strategies in content-based instruction (cf. Peachy, 2007) (cf. Section 2.2.1). The English as LoLT Course illustrated the application of direct and indirect language learning strategies in concept formation (cf. Oxford, 1990). The course content created opportunities for teachers to discover how the language learning strategies could be applied to their classroom practice through co-operative learning (cf. Ellis, 2004b) (cf. Section 2.2.2). The course provided opportunities for teachers to develop their knowledge and skills in concept transfer from the learners' home language to English as the LoLT (cf. Section 2.2.3). It illustrated the development of learners' basic interpersonal communication skills (BICS) to develop their cognitive academic language proficiency (CALP) in English and in their home language (cf. Cummins, 1997). It also emphasised the importance of learners' home language in concept transfer (Odlin, 2005).

However, the course did not clearly explain the role of code-switching as a communicative process in concept transfer which is a language learning process (cf. Ellis, 1994). The incorrect use of the acronym *CALPS* instead of *CALP* throughout the course reinforces the impression that the course did not pay enough attention to explain the underlying SLA theories to the teachers, even at a very basic level.

The course demonstrated how to combine a communicative approach with the teaching of language structures (cf. DoE, 2003a). The English as LoLT Course further provided practical and appropriate examples on how to integrate listening, speaking, reading and writing skills in communicative language teaching (CLT) (cf. Section 2.2.4). However, communicative language teaching (CLT) was not mentioned by name. The course did not overtly explain the basic principles of CLT in second language learning and teaching.

The course emphasised the development of teachers' own language usage in the LoLT (cf. Section 2.2.5) as a meta-cognitive language learning strategy (cf. Anderson, 2005). It further created opportunities for teachers to explore and apply language learning and language use strategies (cf. Cohen, 1996). The course focused on the application of L2 research strategy (cf. Anderson, 2005) in the teachers and learners' listening, speaking, reading, writing and *grammarising* skills. The course could have provided more opportunities for teachers' cognitive development of their grammatical competence in the application of English grammatical rules through focused practicing (cf. Ellis, 2004a)

The English as LoLT Course provided opportunities for the development of teachers' skills to write a logically structured, reflective essay on language learning strategies. It simultaneously illustrated the application of scaffolding (cf. Scrivener, 2005) as a language learning strategy.

The course did not illustrate how teachers could provide learners opportunities to understand how they can learn the target language more effectively. It did not emphasise the importance of using individual, learner-focused language teaching strategies in, for example, styles-and strategy-based instruction (Cohen & Dörnyei, 2002:170-190).

8.2.3 Teacher and Learner Motivation and Attitude toward Learning and Teaching

Killen (2000:xv) suggests that teachers should consider the importance of motivational strategies to help learners achieve the learning outcomes in an OBE lesson by asking the following question: "What motivational strategies can I use to foster self-confidence in my learners? Killen (2000:74;101) views group work, co-operative learning and problem solving as key motivational strategies to build learners' confidence. The workshop and assessment activities in the English as LoLT Course attempted to illustrate and promote collaborative learning through group work to build teachers' self-confidence (cf. Appendix D).

Ellis (2004a:119) points out that there can be little doubt that motivation is a powerful factor in SLA. Motivation is closely aligned to attitudes. Ellis (2004a:117) observes that attitudes are related to motivation by providing support to the learners' overall orientation. He views attitude as the persistence shown by the learner in striving for a goal. The English as LoLT Course tried to foster a positive attitude towards teacher self-development. The following remark, which appeared at the end of each booklet (cf. SHC

R&D Course Participant File, 2003:32), encouraged the teachers to continue striving towards their goal of self-development in using English as the LoLT.

Well done! We have come to the end of Booklet One, and we hope that you have found it interesting, challenging and personally useful for both yourself and your learners. We look forward to looking at your assignments, and we hope that the next booklet will be just as useful. Good luck with your tasks!

In addition, the above remark illustrated the use of positive statements as part of affective language learning strategies (cf. Oxford, 1990:141).

The English as LoLT Course also illustrated the value of positive feedback in motivating learners to use English confidently. Workshop Activity 7 in Booklet 6 (SHC R&D Course Participant File, 2003:32-36), for example, focused teachers' attention explicitly on providing positive feedback to learners' on their oral and written output.

The course framework (cf. Appendix D), moreover, emphasised the importance of scaffolding to reinforce teachers' confidence in using English as the language of learning and teaching. The course illustrated the use of scaffolding (cf. Nunan, 2004:35; Ellis, 2004b:269) as a language learning strategy in task-based teaching and learning (cf. Section 2.2.5).

Dörnyei (2002:138) claims that "motivation can hardly be examined in a more situated manner than within a task-based framework". Dörnyei (2002:138-157) views motivation from a process-orientated perspective as a dynamic factor that displays continuous fluctuation during a language learning task. The process model of learning motivation in the L2 classroom (Dörnyei, 2002:141) distinguishes three stages, namely the pre-actional, actional and post-actional stages. These stages correspond with Ellis' (2004b:243) three phases in the design of a task-based lesson namely, a pre-task, during task and post-task phase. According to Dörnyei (2002:140), motivation first needs to be generated during the pre-actional stage. The motivational dimension in this stage is referred to as *choice motivation* because the generated motivation leads to the selection of the goal or task that the individual learner will pursue. The generated motivation needs to be actively maintained and protected during the actional stage while the learner is doing the task. This motivational dimension is referred to as *executive motivation*. The third phase called *motivational retrospection* follows the completion of the action. This post-actional stage concerns the learner's retrospective evaluation of how things went.

The English as LoLT Course curriculum provided examples of process-oriented motivation in the task-based approach of the workshop and assessment activities in the booklets. The first set of activities in the workshop and portfolio assessment in Booklet 1 (cf. Appendix W) provides an example of how the course promoted task-motivation through task-based learning and teaching. The two workshop activities in the pre-task phase (cf. Appendix W) prepared teachers for the task of interviewing their colleagues and community members about the status of English. Teachers had to complete a speech bubble to express their own feelings about using English as the LoLT and then work in pairs to brainstorm possible reasons why English should or should not be the LoLT in their schools. These pre-task activities provided opportunities for teachers to prepare for the main task through the selection of relevant vocabulary. The activity also provided opportunities to generate teachers' motivation of choice as they would select their own approach to the interview.

The first task of the assessment activity provided guidance to teachers in how to structure and with whom to conduct the interview. Teachers were required to complete and submit the interview schedule for assessment. The interview schedule provided input data (Ellis, 2004b:250) to support learners in the during-task phase. The interview schedule would also create opportunities to generate teachers' executive motivation needs (Dörnyei, 2002:140) that had to be actively maintained and protected during the actional stage while they would be completing the interview schedule.

In addition, the second task of the assessment activity required teachers to summarise their findings after the interview. This exercise illustrated the application of explicit techniques for focusing on form during the task (Ellis, 2004b:257). This activity could contribute to maintain teachers' executive motivation (Dörnyei, 2002:140) as they received explicit guidance on how to write the summary.

The post-task phase (Ellis, 2004b:258) of the interviews on the status of English and on the languages used in and around the 4 schools would take place during the mentoring sessions of the course. The SHC R&D course facilitator would review the teachers' tasks with them before submitting their portfolios to the assessment team. They would also reflect on the task and on how the interviews went. Teachers had to complete a self-assessment form (cf. SHC R&D Course Participant File, 2003:15). This activity provided opportunities to teachers for generating *motivational retrospection* (Dörnyei, 2002:140) after the completion of the task.

Conclusion

The above analysis provides evidence of how the English as LoLT Course curriculum created opportunities to promote teacher and learner motivation through collaborative learning, positive feedback, scaffolding and the application of motivation in task-based language learning and teaching.

However, these opportunities were limited. The course curriculum did not create regular opportunities for the course participants to further develop their own and their peers' motivation and confidence in using English in their Intermediate Phase Professional Working Groups and at their district office meetings.

8.2.4 Management support to the implementation of English as the LoLT

The evaluation describes the course response according to the following needs identified in the needs assessment phase (cf. Table 3).

The first need was the decrease in the learner/teacher ratio. The English as LoLT Course could not respond to this need because the allocation of teachers to schools was a matter that had to be addressed by the School Governing Bodies in conjunction with the department. This matter was beyond the scope of the language programme.

The second need concerned the development of the School Management Teams (SMTs) and of the procurement district officials to manage the provisioning of learning and teaching support material effectively. The English as LoLT Course could not respond to this need. The language intervention programme did not include the specialised administrative focus at school and district level that was required for this developmental initiative. This matter was also beyond the scope of the language programme.

The third need involved the provisioning of libraries and the improvement of security. The course could not respond to this need that also required a specialised administrative process. However, the course emphasised the importance of reading corners in the classrooms as resource pools for learning and teaching materials (cf. SHC R&D Course Participant File, 2003:25).

The fourth need concerned the development of SMTs of the four IDDP schools and the relevant Thabo Mofutsanyana district officials to provide effective monitoring and support mechanisms for the professional development of teachers. The English as LoLT Course did not respond to this need. The course could have facilitated opportunities for the

programme participants to share their planning and assessment templates that included an emphasis on the use of English as the LoLT (cf. Section 8.2.1). Teachers could also have shared these techniques with the SMTs in a process similar to their whole school development of a language pledge (cf. Section 8.2.2.1). The SMTs could have provided focused support to develop English as the LoLT to the Intermediate Phase teachers and learners in particular and to the whole school in general. In addition, the inclusion of two district officials as programme participants created an opportunity to strengthen support mechanisms at district level for the development of Intermediate Phase teachers' use of English as the LoLT. The course could have required that the two district officials share their knowledge and skills on how to use English as the LoLT with their peers. The course did not illustrate differentiation to accommodate the specific support focus of the district officials. The course content did not explore this opportunity (cf. Appendix T).

The fifth need required the creation of increased opportunities to provide in-service training to teachers for improved teaching practices. The English as LoLT Course *per se* provided an opportunity to teachers to improve their own teaching practices. However, it did not use the workshop and assessment activities to develop teachers' skills to lobby for increased professional development opportunities (cf. Appendix T).

The course could have included, for example, the development of teachers' skills in writing a formal request to their SMTs for additional professional development. The course furthermore did not require the programme participants to share their knowledge with their peers in their professional working groups (PWGs). The course could, for example, have developed the participants' skills in report writing by requesting them to report on their colleagues' response to their information sharing on the course content.

Conclusion

Management support to language learning and teaching was beyond the scope of the course in the following identified needs (cf. Chapter 6, Section 6.3.8): the decrease in learner/teacher ratio; the provisioning of language learning and teaching material; and the provisioning of libraries and improved security. In addition, it became evident that the course did not explicitly focus on the interaction between the programme participants and the SMTs and district officials to provide opportunities for the development of effective monitoring and support mechanisms for the use of English as the LoLT. The course also did not develop the Intermediate Phase teachers' skills to formally negotiate increased opportunities for their own professional development.

8.2.5 The Role and Status of English in the IDDP Schools

This discussion provides an analysis of the course response to the role and status of English in the 4 IDDP schools. The discussion is informed by relevant research. Baldauf (2005:957-970) acknowledges the role and status of a second language as an important issue in his overview of language planning and policy research. Baldauf (2005:959) provides a description of the following four types of language policy and planning practices: status planning (about society), corpus planning (about language), language-in-education (acquisition) planning (about learning), or prestige planning (about image). He indicates that these four types can be realised from two approaches, namely a policy approach or a cultivation approach. Baldauf (2005:959) explains that a policy approach with a focus on form constitutes basic language and policy decisions and their implementation. A cultivation approach emphasises the functional extension of language development and use.

According to Van Els (2005:972), the status of English as a second language is defined according to its two particular functions of *lingua franca* and of language of instruction. Van Els (2005:972-973) explains the status of English as a *lingua franca* when it is used for international communication. He argues that non-native users tend to take over the “ownership” of the language and to adapt it according to their own needs and linguistic capacities. They simplify, for example, English vocabulary and syntax. According to Graddol (cited in Van Els, 2005:973), English as *lingua franca* has acquired, in this sense, the status of a *global resource* in which non-native speakers have become *minority shareholders*. In addition, Van Els (2005:973) uses English to explain the status of a second language as the language of instruction in the educational system. He examines the case of choosing a non-native second language in a school curriculum to provide instruction in most, or all of the non-language school subjects. This description matches the status of English in the South African education system, as it is the language of learning and teaching in most South African schools (cf. Uys, 2005) (cf. Chapter 1, Section 1.2).

Van Els (2005:973) continues to explain that the reason for choosing a non-native second language as the language of instruction in a school curriculum lies in the expectation that a higher command of the second language may be achieved more quickly or efficiently than in regular second language classes. According to Van Els (2005:973), the choice of the particular second language forms part of the field of status planning, but not the motivation for a particular choice, nor the methodology used in the lessons.

The above discussion on the role and status of English as a second language in language planning and policy research informs the current descriptive evaluation. The question to be answered is whether, and how, the English as LoLT Course promoted the role and status of English in the four IDDP schools.

Booklet 1 (cf. SHC R&D Course Participant File, 2003:10) created an opportunity for the teachers and community members of the four IDDP schools to indicate their language of learning of their choice: English or learners' home language (cf. Appendix W). The English as LoLT Course therefore required participants to conduct a survey (cf. Appendix W) that could lead to status planning at a micro-level in the four IDDP schools in an overt (explicit, planned) way (Baldauf, 2005:959,65).

However, the survey (cf. Appendix W) did not contribute overtly to status planning (cf. Van Els, 2005:973). Status planning occurred when the members of the school governing bodies (SGBs) in the four IDDP schools chose English as the language of learning and teaching.

Booklet 4 (cf. SHC R&D Course Participant File, 2003:1-12) created an opportunity for programme participants to develop an English language pledge in collaboration with their colleagues. The pledge (cf. SHC R&D Course Participant File, 2003:8) would not only promote the status of English as medium of instruction, but also as *lingua franca* (cf. Van Els, 2005:973). The four IDDP schools offered English as the first additional language to learners' home language in order to promote the use of English in learners' everyday communication. Having English as the first additional language would also facilitate a smoother transition from learners' home language from Grades 1 – 3 to English as the LoLT from Grade 4 and onward.

Booklet 4 (cf. SHC R&D Course Participant File, 2003:1-12) provided guidelines to the programme participants on how to develop the English language pledge. The language pledge would afford staff members an opportunity to demonstrate their commitment and responsibility in improving the status of English according to its roles (functions) as *lingua franca* and as language of instruction (Van Els, 2005:973) at their school. Assessment Activity 1 (cf. SHC R&D Course Participant File, 2003:12) required teachers to collect ideas from each staff member during the meeting about how to improve the use of English in the classrooms, in the staffroom and around the school. Each staff member would then sign the language pledge at the next staff meeting after approval of the draft pledge. The signing of the language pledge intended to promote a process of

cultivation planning in language-in-education planning to enhance language teaching functions (cf. Baldauf, 2005:961).

Conclusion

The above discussion provides evidence that the English as LoLT Course responded to the need for clear guidelines in the implementation of English as the LoLT in the IDDP schools. The development of the English as LoLT Course took place in response to teachers' need for a practical intervention programme in the four IDDP schools (cf. Table 3). The guidelines in the four IDDP schools' English language pledges encouraged the promotion of learners' basic interpersonal communication skills (Cummins, 1997:57) in English as the *lingua franca* (Van Els, 2005:973). In addition, these guidelines could serve to promote learners' cognitive academic language proficiency (Cummins, 1997:57) in English as the language of learning and teaching (cf. Chapter 8, Section 8.2.2.3).

The English as LoLT Course curriculum further created opportunities for the development of English whole-school, classroom and learning area routines. The guidelines provided in Booklet 7 (SHC R&D Course Participation File, 2003:4-44) were intended to assist teachers in the development of these routines (cf. Section 2.2.1). It was hoped that the routines would create a supportive context to promote the status of English as LoLT and as *lingua franca* (Van Els, 2005:973). However, the course did not create opportunities for the teachers to initiate the facilitation of a language-in-education policy planning process with the school governing bodies (SGBs) of the four IDDP schools. According to the language policy norms and standards in Section 6(1) of the South African Schools Act (84/1996), the SGBs must stipulate "how the school will promote multilingualism through using more than one language of learning and/or by offering additional languages as fully-fledged subjects, and/or applying special immersion or language maintenance programmes". The course could only provide some practical guidelines (cf. Appendix T; Appendix V) to promote a meaningful interaction between English and the learners' home language(s). Booklet 5 of the English as LoLT Course (cf. Appendix T) explicitly promotes, for example, the value of learners' home language(s) in learning and teaching.

8.2.6 The Role and Status of Intermediate Phase Teachers in Curriculum Decisions

The Norms and Standards for Educators of 2000 (DoE, 2000a) identify seven roles for teachers. The following roles are relevant to this evaluation theme: teachers are viewed

as interpreters and designers of learning programmes and materials, as researchers and lifelong learners and as learning area/phase specialists.

The English as LoLT Course content (cf. Appendix T) aimed to develop teachers' confidence to take responsibility for their own curriculum decisions through active learner participation in planning and in material development. Liddicoat (2005:1004-6) sees syllabus and material development as corpus planning products that "reflect a link between corpus planning and language-in-education planning". He argues that materials development as corpus planning should ideally be seen as a late stage of language planning that follows on certain language-in-education decisions. Liddicoat (2005:1006) identifies users as producers as a basic approach to materials design where "teachers themselves develop materials for newly implemented language programmes".

The English as LoLT Course, as a language programme, created opportunities for the programme participants to interpret and design their Intermediate Phase lesson plans as learning area and phase specialists (cf. Appendix T). The teachers could decide on how to include English language learning strategies (cf. Appendix V) in the OBE curriculum at the micro-level of the four IDDP schools. They could make this decision according to their roles as interpreters and designers of learning programmes and materials and as learning area/phase specialists. Teachers could also make curriculum decisions based on their status as Intermediate Phase teachers.

In addition, the English as LoLT Course content provided opportunities to develop teachers' confidence in making informed curriculum decisions through a constant emphasis on their role as researchers of their classroom practices (cf. Appendix T). The workshop and assessment activities created opportunities for teachers to do action research on OBE practices in general and on English language learning and teaching in particular.

Mackey and Gass (2005:350) define action research as "research carried out by practitioners in order to gain a better understanding of the dynamics of how second languages are learned and taught, together with some focus on improving the conditions and efficiency of learning and teaching". Assessment Activity 2 in Booklet 3 (SHC R&D Course Participant File, 2003:25-28) illustrates the development of teachers' action research skills according to Mackey and Gass's (2005:350) definition. As already mentioned, the course curriculum required teachers who participated in the language programme to conduct a survey with 8 colleagues about their use of English question and instruction phrases in each learning area (cf. Section 8.2.1.2).

The above example of action research in Booklet 3 (SHC R&D Course Participant File, 2003:28) provides evidence of an emphasis on action research where participants “are themselves centrally involved in a systematic process of enquiry arising from their own practical concerns” (Burns, 2005:241). The example furthermore illustrates, at a very basic level, the action research model presented by Kemmis and McTaggart (cited in Burns, 2005:244). The model is a self-reflective spiral with the following four “moments”: planning, action, observation and reflection.

However, both examples mentioned follow the self-reflective spiral in the action research model of Kemmis and McTaggart (cited in Burns, 2005:244). Nunan (1993:62) also highlights a cyclic approach to action research in professional development programmes where they “can feed into a constant cycle of intervention, monitoring and modification to classroom practice”.

In addition, the example of action research in Booklet 3 (SHC R&D Course Participant File, 2003:28) illustrates a collaborative approach to action research among the teachers who participated in the course, their colleagues and the Sacred Heart College Research and Development (SHC R&D) team. Mackey and Gass (2005:220) confirm that “collaborative approaches to research are becoming increasingly common and valued, with language teachers and researchers working together as a team to investigate various aspects of second language learning”. Burns (2005:247) also advocates action research as “ongoing collaborative teacher development processes that can create the conditions to support and influence institutional change”. This perspective stresses the potential value of collaborative research to increase the role and status of Intermediate Phase teachers’ in curriculum decisions at the micro-level (cf. Baldauf, 2005:959) of the four IDDP schools.

Conclusion

The above descriptive analysis provides evidence that the curriculum provided opportunities to develop teachers in their roles as interpreters and designers of learning programmes and materials, as researchers and lifelong learners and as practitioners of English as the LoLT. In addition, the emphasis on collaborative action research in the course curriculum initiated a response to teachers’ need to develop their confidence in taking responsibility for their own curriculum decisions (cf. Table 3).

However, the English as LoLT Course did not promote the development of formalised structures for the professional development of Intermediate Phase teachers within and

across schools in the same geographical area. The formal establishment and functioning of the professional working groups (PWGs) formed part of an IDDP intervention programme on instructional leadership.

8.2.7 *The Role and Status of English in the Phuthaditjhaba Community*

This descriptive evaluation considers the course response to the role and status of English in the Phuthaditjhaba community.

As previously mentioned (cf. Sections 8.2.3 & 8.2.5), the course required teachers to conduct a survey on the range of languages understood, spoken, read and written at school and at home for their second assessment activity in Booklet 1 (SHC R&D Course Participant File, 2003:13). The introductory section in Booklet 4 (SHC R&D Course Participant File, 2003:5) referred to this survey finding that the people in the Phuthaditjhaba community did not make much use of English in every day situations.

Booklet 4 (SHC R&D Course Participant File, 2003:5) provided the following explanation: "This is because English is not the home language of families in your communities. As a result, the school is often the only place where any English is spoken, heard and read." However, the School Governing Bodies of all four IDDP schools valued the status of English as a medium of instruction (Van Els, 2005) for their children.

The apparent contradiction presented above can be explained by considering the relationship between English and learners' home language(s). According to Ager (2005:1040), the status of a language is "its position or standing relative to other languages". English has a high status in the public domains of international economy; education and diplomacy (cf. Ager, 2005:1038-40). Van Els (2005:972) refers to prestige as the weight that a language carries in comparison to other languages. English has high prestige in the Phuthaditsjhaba community as a high-status international and national language in the public domain of economy and education. However, English has low prestige in the day-to-day communication of the Phuthaditsjhaba community. SeSotho, on the other hand, enjoys high prestige as a national language of South Africa and as a home language of most learners in Phuthaditshjaba (Strauss, 2002:3-4). However, the Phuthaditjhaba community represented in the school governing bodies (SGBs) of the four IDDP schools chose English as the language of learning and teaching. This choice was based on the high weighting or prestige accorded to English in education.

The response of the English as LoLT Course curriculum to this language-in-education scenario was to promote English as a language of day-to-day communication. In addition, the language programme promoted learners' home language(s) as the basis for language learning and teaching. For example, Booklet 2 (SHC R&D Course Participant File, 2003:5-15) promoted the development of learners' and teachers' basic interpersonal language skills (BICS) (Cummins, 1997:56). The workshop activities also encouraged teachers to listen to English broadcasts, watch English programmes on television and to read English newspapers, magazines and books. The course content intended to motivate teachers to include a variety of resources such as relevant articles and magazines in the learning experiences to improve learners' exposure to real-life situations.

Booklet 4 (SHC R&D Course Participant File, 2003:4-12) provided practical examples of developing guidelines for using English in everyday communication, as well as in learning and teaching. Booklet 5 (SHC R&D Course Participant File, 2003:5-18) aimed at promoting the value of the learners' home language(s) in language learning and teaching. It was called *Never underestimate the value of home languages*.

Ager (2005:1035) refers to the promotion of a language as an activity in image planning. The following example (Ager, 2005:1036) of two strategies used by the Welsh Language Board (WLB) to build the image of the Welsh language have relevance to the present evaluation. The one objective of the WLB was to nurture confidence among Welsh speakers to increase their use of the language. The other objective was to promote the use of Welsh by ensuring the appropriate provision of published books, magazines and papers, and by seeking to ensure that these are widely read.

The English as LoLT Course content attempted to nurture learners' confidence to use English as a language for everyday communication (cf. Appendix T). The course methodology also promoted the use of a variety of texts such as books, magazines and papers in teachers' lesson plans and presentations (cf. Appendix S).

Conclusion

The English as LoLT Course responded to the role and status of English in the community. It created opportunities for the teachers to build the image of English in everyday communication in order to complement and strengthen its role as language of learning and teaching. In addition, the course emphasised the important role of the learners' home languages in language and teaching.

The evaluations presented above described the English as LoLT Course response (cf. Figure 3, Stage 4) to the Intermediate Phase teachers' identified needs (cf. Figure 3, Stage 1b) according to the seven evaluation themes of the needs analysis (cf. Table 3).

The overall evaluation of the course response presented in the following sub-section offers a summary of the course response.

8.2.8 Overall Evaluation of the English as LoLT Course in the Implementation Phase

The qualitative description of the English as LoLT Course evaluation provides evidence of a response to teachers' identified needs (Table 3) which illustrated the following features.

The course modelled a task-based approach to OBE and to English language learning and teaching practices. These practices were not only informed by OBE policies and guidelines, but they bridged gaps between OBE policy and practice through the amount of detail provided to address teachers' specific needs in lesson planning, presentation and continuous assessment.

In addition, the practical examples were informed by sound OBE and English language learning and teaching strategies and techniques. The course further combined general OBE and specific English language learning and teaching strategies in their application to classroom practice. The workshop and assessment activities demonstrated co-operative learning, content-based instruction and action research. The course consequently created opportunities to develop teacher's confidence to participate in curriculum decisions in the 4 IDDP schools.

The English as LoLT Course further emphasised the role and status of English in everyday communication and as LoLT in classroom practice and in the broader language learning and teaching context of the 4 IDDP schools. The course response therefore addressed the formative goals and interests of curriculum and teacher self-development expressed by the multiple stakeholders of the primary evaluation audience.

However, the descriptive evaluations have provided evidence of the following shortcomings. The English as LoLT Course did not provide simplified summaries of the current approaches to second language learning and teaching strategies. In addition, the course did not provide examples of checklists, guidelines and templates that would explain the practical application of these approaches, strategies and techniques. The

course curriculum therefore seems to have over-simplified the course content in an attempt nurture teachers' active participation.

The apparent over-simplification of the English as LoLT Course has led to a lack of explicit attention paid to individual differences in motivation, in learning styles and in language teaching and learning strategies. This lack of differentiation seems to be a common pitfall in second language teaching and learning research. Anderson (2005:758) emphasises that individual learners use a variety of strategies and approach learning a language differently. He comments that this fact "is not taken into careful consideration within the context of most of the methods for language learning and teaching".

In addition, the English as LoLT Course did not offer specific guidelines to the programme participants on how to formally communicate with and elicit management support for language teaching. The English as LoLT Course was therefore unable to create opportunities for the Intermediate Phase teachers to elicit management support for the implementation of English as LoLT.

The English as LoLT Course could have provided teachers with simplified summaries of relevant planning and policy matters to complement the guidelines developed in the English language pledge. The teachers could have participated more meaningfully to ensure the role and status of English in the 4 IDDP schools, if the course had placed more emphasis on teacher participation in language-in-education policy matters.

A previously indicated (cf. Section 8.1), the recommendations for the refinement of the course that follow from these conclusions are presented in Chapter 11, Section 11.2.2.

8.3 Meta-Evaluation of the English as LoLT Course in the Implementation Phase

The ability of Lynch's (1996:4) CAM to guide a valid evaluation of the English as LoLT Course in the implementation phase of this case study is described in this section. The descriptive analysis is presented according to the core criteria of flexibility, appropriateness, clarity of description and clarity of logic (cf. Chapter 2, Section 2.5.3.5). Reflexive comments on the effectiveness of the model's guidance to present a convincing descriptive evaluation in the implementation phase are presented. Similar comments on the usefulness and relevance of the verification, monitoring and course curriculum evaluation stages in the implementation phase (cf. Figure 3, Phase 2) conclude this meta-evaluation section.

8.3.1 Flexibility

The flexibility of Lynch's (1996:4) CAM to present guidelines on qualitative and quantitative data collection and analysis procedures enabled this case study to continue producing rich sets of data in its implementation phase (cf. Chapter 5, Section 5.5.1; Chapter 6, Section 6.4.1). The three programme evaluation stages (cf. Figure 3, Phase 2) in the implementation phase collected and analysed pre-dominantly qualitative sets of data to serve the primary evaluation audiences' formative goals of curriculum and teacher-self-development.

Lynch (2003:29) provides an example of a mixed evaluation design over a longer period of time. The example consists of an evaluation study with a positivist evaluation design, followed by a study with an interpretivist evaluation design, which could again be followed by a study with a positivist evaluation design (cf. Chapter 1, Section 4.1). This example clearly illustrates that the flexibility of the context adaptive model (Lynch, 1996:4) does not include the mixing of paradigms in language programme evaluation (cf. Chapter 5, Section 5.5). The model only promotes the mixing of qualitative and quantitative data at the level of evaluation research methodology (cf. Lynch, 2003:27-29). It consequently did not promote the selection of a mixed evaluation research design to validate the evaluations in the implementation phase of the English as LoLT Course case study.

Creswell's (2003:16) Mixed Method Design (cf. Figure 3; Chapter 5, Section 5.3.1) directed the data collection and interpretation of the evaluation stages (Stages 2a,b; 3; 4) instead. Successive rounds of evaluation studies (Creswell, 2003:16; Lynch, 2003:29) took place during the implementation period of two years in the English as LoLT Course case study to collect sets of quantitative and qualitative data (cf. Chapter 7, Section 7.2.2). The mixed evaluation design for the implementation phase enabled the collection and interpretation of qualitative data in the two evaluability assessments (Figure 3, Stages 2a,b) to verify the appropriateness, scope and level of the course.

Predominantly qualitative data were collected and analysed during the programme monitoring stage (Figure 3, Stage 3). The cumulative mark sheets of the English as LoLT Course participants provided quantitative evidence of their progress (cf. Appendix I). The SHC R&D assessment team (cf. Chapter 7, Section 7.4.2.3) and the moderator operationally controlled the inter-rater reliability of the portfolio-based assessments. The writer as evaluator also conducted a qualitative content analysis (cf. Figure 3, Stage 4) of the English as LoLT Course curriculum response to the Intermediate Phase teachers' identified needs (cf. Figure 3, Stage 1b).

The collection of predominantly qualitative data to serve the formative evaluation goals of the primary evaluation audience validated the evaluations in this case study from an interpretivist programme evaluation perspective (cf. Table 1). The mixed evaluation design of the implementation phase validated evaluations that used quantitative and qualitative data collection and interpretation methods from a pragmatic evaluation perspective (cf. Table 1). This paradigm validated the data collections and analyses based on their usefulness to pre-empt and solve problems in the development and monitoring of the language programme. The criterion of usefulness in utilitarian pragmatism (cf. Table 1) and the evaluation standard of utility (Beretta, 18; Stuffebeam, 2001) therefore validated the evaluations in the implementation phase of the English as LoLT Course case study.

8.3.2 Appropriateness

As indicated in the previous section (cf. Section 8.3.1), the formative goals of curriculum and teacher-self development play a dominant role in the evaluation of the English as LoLT Course during its implementation phase. Lynch (2003:7) defines the purpose of formative assessment as: “decisions about assessing the progress and ongoing needs of individuals in a language programme or the ongoing nature of the programme (which components are working, which need to be changed).”

The following discussion examines the application of Lynch’s (2003:7) definition of formative assessment to evaluation in the English as LoLT Course implementation phase according to the following considerations: the overlap between learner assessment and programme evaluation in portfolio-based assessment and increased validity through prolonged engagement with the evaluation context.

Portfolio-based assessment: overlap and interaction between learner assessment and programme evaluation

The above definition of formative assessment (Lynch, 2003:7) promoted a focus on the overlap and interaction between learner assessment and programme evaluation in the English as LoLT Course evaluation. The SHC R&D assessment team, the moderator and the writer as project manager, researcher and evaluator continuously monitored participant progress in the English as LoLT Course (cf. Chapter 7, Section 7.4.2.1-3). The quantitative data on participant progress are presented in a cumulative mark sheet (cf. Appendix I). The data present the marks allocated to the programme participants for their portfolio assignments in each of the eight English as LoLT Course booklets (cf. Table 6).

The qualitative data consist of written comments to the participants in their portfolios about their response to the assessment activities in each booklet. The SHC R&D facilitator discussed the feedback from the assessment team with the teachers individually during the mentoring sessions, as well as with the group of programme participants during the workshop sessions (cf. Chapter 7, Section 7.4.4.3). Copies of the portfolios are available in the English as LoLT Course Portfolio File (to be noted in bibliography). In addition, the workshop and assessment activities of the English as LoLT Course required that the teachers themselves continuously monitor and assess their own and their peers' progress (cf. Chapter 7, Section 7.4.2.4).

Lynch (2003:1) acknowledges the challenge posed by the overlap and interaction between language assessment and programme evaluation in a particular evaluation context. The main overlap and interaction in the formative evaluation context of the English as LoLT Course occurred in portfolio assessment.

Lynch (2003:119 -120; 124) views the portfolio as a central data collection procedure in alternative or interpretivist assessment. Lynch (2003:120) explains that the portfolio provides qualitative and quantitative evidence in a longitudinal picture of individual student learning and/or of language programme patterns. This portrait is provided within the context of a particular learning community in relation to the language ability being developed. As previously indicated in this section, the SHC R&D assessment team evaluated the assessment portfolios of the programme participants in the English as LoLT Course on a regular basis. These portfolios sketched the development of the twelve teachers and the two district officials' individual language usage in English as the LoLT.

The moderator, the writer as evaluator, the SHC R&D assessment team and the language programme participants identified common language abilities that needed further development. This identification took place through the process of continuous assessment. Programme participants' progress was assessed after each Booklet (cf. Appendix I). This continuous needs assessment was based on the aggregation of qualitative and quantitative data sets from the assessment activities in the language programme participants' portfolios. The development of teachers' English writing skills, especially their grammatical competency and their abilities for logical sequencing, received, for example, additional attention in the assessment activities from Booklets 4 to 8 (cf. SHC R&D Course Participant File, 2003).

Lynch (2003:124) indicates that the difference between individual learner assessment and language programme evaluation lies in the unit of analysis. The analysis of the participants' draft introductory paragraphs to their essays could, for example, shift from an individual participant's written draft as the unit of analysis in learner assessment, to the written responses of all the programme participants as the unit of analysis in language programme evaluation. An individual or group analysis of teachers' written responses could then indicate which language abilities needed an individual or group focus for continued development. Hamp-Lyons and Condon (2000:3) appreciate the value of portfolio-based writing assessment to provide "an instrument that incorporates the products of instruction and that can, if the assessment is designed carefully, provide an evaluation that feeds back into the process of instruction".

McNamara (1998:308) refers to the extent to which the feedback on assessments influences teaching and learning as *washback*. This concept is linked to the validity of assessments and is associated with Messick's (1995:741) concept of consequential validity. Messick (1995:742) defines validity as: "nothing less than an evaluative summary of both the evidence for and the actual – as well as potential – consequences of score interpretation and use". Messick (1996:4 -19) explores the relationship between validity and washback in performance assessments. He includes washback as one of six important forms of evidence that contribute to the validity of language test interpretation and use.

Most important for the present discussion is Messick's (1996:19) emphasis on washback as good or bad learning and teaching practice that "is evidently linked to the introduction and use of the test". As previously mentioned (cf. Section 8.2.1.3), the assessment activities in the English as LoLT Programme participants' portfolios illustrate positive OBE teaching practices and task-based language learning and teaching strategies (cf. Ellis, 2004b; Nunan, 2004). Positive washback therefore validated the assessment of participants' progress and the continued development of the language programme.

Hamp-Lyons and Condon (2000:3) furthermore emphasise the importance of the instructional context for the validity and reliability of portfolio-based assessments. They argue that a valid and reliable evaluation of a portfolio can only be done when the instructional context has been considered. Knowledge of the instructional context then becomes vital to continually improve the instruction. Hamp-Lyons and Condon (2000:3) conclude that the interrelation between assessment and instruction "is one of the few features of portfolio assessment that is not negotiable". Lynch (2003:124) highlights the

transformational and developmental value of portfolio-based assessment for communities and for curriculum innovation and development in the instructional context.

The above discussion strengthens the link between the instructional or education and evaluation context already established in the needs assessment phase (cf. Figure 3, Stage 1a) of the English as LoLT Course (cf. Chapter 6, Section 6.2.2). An assessment level that matched the performance level of the programme participants would empower them to be able to cope successfully with the tasks in their portfolios. The measurement principle of fairness would consequently increase the validity of the portfolio-based assessments (Lynch, 2003:159).

The findings of the second evaluability assessment (Chapter 7, Section 7.3.2.5) established an appropriate match between participant performance and the English as LoLT Course content. These findings led to an adjustment of the level and scope of the English as LoLT Course. The knowledge acquired from the first workshop with the sixteen Intermediate Phase Teachers of the four IDDP schools in Phuthadijhaba led to a more appropriate formulation of the learning outcomes and assessment standards of the course (cf. Table 6). The instructional context of the English as LoLT Course could therefore be linked to assessment activities at the appropriate level.

In addition, the second evaluability assessment (cf. Figure 3, Stage 1b) increased the relevance of the English as LoLT Course curriculum to teachers' needs in coping with English as the LoLT. Yalden (1987:131) emphasises the importance of a follow-up session on the needs survey to acquire more detailed knowledge of the learning context before designing a course framework. The increased relevance of the English as LoLT Course led consequently increased its usefulness. The findings of the second evaluability assessment (Chapter 7, Section 7.3.2.5) promoted the criterion of usefulness in interpretivism and the criterion of utility in utilitarian pragmatism (cf. Table 1), as well as the evaluation standard of utility in education (Stufflebeam, 2001) and in language programme evaluation (Beretta, 1992:18).

Increased validity through prolonged engagement with the evaluation context

Lynch (1996:57) emphasises prolonged engagement with the evaluation context to increase the credibility of the language programme evaluation. Brown (2002:15) highlights the importance of ongoing assessments to constantly assure and ensure the quality of the language programme content.

The emphasis on prolonged engagement led to several rounds of assessments during the implementation phase of the English as LoLT Course. Many continuous programme monitoring rounds (cf. Figure 3, Stage 3) were conducted by various members of the evaluation team (cf. Chapter 7, Section 7.4.2.1-4). Evidence of these programme monitoring visits is documented in the IDDP Quarterly Progress Reports. The writer as project manager submitted the progress monitoring reports to the strategic partners in the programme evaluation. The relevant provincial and district officials from the Free State Department of Education verified the progress reports during visits to the four IDDP schools. An example of a progress report is appended to the study (cf. Appendix F).

In addition, an example of programme monitoring by the representative of the Flemish Government is appended to this study (cf. Appendix G). The representative also visited the four IDDP schools to monitor programme and participant progress. Frequent monitoring of the English as LoLT implementation process by a variety of experienced, primary level stakeholders in the evaluation audience consequently increased the reliability of the qualitative and quantitative data collected (cf. Chapter 7, Section 7.4.2.1-4) (cf. Appendices E,F,G,I).

The reliability of the data increased, in turn, the credibility or internal validity of the language programme monitoring process. The internal reliability and validity of the programme monitoring process heightened the usefulness of the English as LoLT Course evaluation in the implementation phase of this case study. The evaluation standard of utility (Stufflebeam, 2001; Beretta, 1992:18) and the validation criterion of usefulness in interpretivism and in utilitarian pragmatism (cf. Table 1) therefore validated programme monitoring process in the English as LoLT Course evaluation.

8.3.3 *Clarity of Description*

Lynch's (1996:4) CAM required the identification of preliminary evaluation themes as the third step (cf. Chapter 4, Section 4.3) in the language programme evaluation process. The writer identified seven themes from the suggested list of themes provided in Lynch (2003:19-20). These seven themes structured the data collected and analysed in the descriptive evaluation of the twenty six Intermediate Phase teachers' curriculum needs in the four IDDP schools (cf. Table 3). The same seven themes organised the descriptive evaluation of the English as LoLT Course curriculum response (cf. Section 8.1) to the Intermediate Phase teachers' needs identified in the needs assessment phase of this case study (cf. Figure 3, Stage 1b). The application of the third step in

Lynch's (1996:4) promoted clarity of description and consistency in the comparative analysis.

In addition, the seven themes of the descriptive evaluations in the needs assessment and implementation phases provided clear descriptions of the link between the education and evaluation contexts of the Intermediate Phase classrooms in the four IDDP schools (cf. Chapter 6, Section 6.2.2; Section 8.3.2).

Lynch (2003:118-147) furthermore offered clear descriptions of the predominantly interpretivist data collection and analysis procedures in the English as LoLT Course implementation phase. As previously mentioned (cf. Section 8.3.2), Lynch (2003:119-20) views portfolio-based assessment as an important interpretivist data collection procedure. The relationship between learner assessment and programme evaluation in portfolio-based assessment was, for example, clearly explained (cf. Lynch, 2003:124). This explanation enabled an exploration of the overlap between language assessment and programme evaluation in the English as LoLT Course.

The above discussion provides evidence that Lynch's (1996:4) CAM promoted clarity of description in the evaluation of the English as LoLT Course implementation phase. This promotion enabled the language programme evaluation to adhere to the evaluation standard of accuracy (cf. Stufflebeam, 2001; Beretta, 1992:18) and to the interpretivist criterion of coherence (Leedy & Ormrod, 2001:165).

8.3.4 Clarity of Logic

Lynch's (2003:7) emphasis on the continuous assessment of language programme and participant progress enabled the English as LoLT Course evaluation to align with the formative purpose of assessment. This alignment of purpose and method confirmed the feasibility (Beretta, 1992:16; cf. also Stufflebeam, 1999) of the English as LoLT Course evaluation in the implementation phase of this case study.

Lynch's (2003:15) emphasis on the identification of multiple primary level stakeholders in the evaluation audiences (cf. Chapter 3, Section 3.2.1.1), resulted in a participatory evaluation of the programme verification and monitoring stages (cf. Figure 3, Stages 2a,b; 3) in the implementation phase of the English as LoLT Course. As previously indicated (cf. Section 8.3), the prolonged engagement of the primary level stakeholders in the monitoring of programme and learner progress has enabled triangulation in the data collection procedures. The triangulation increased the internal reliability and validity of the evaluations. The promotion of participatory evaluation (Chapter 5, Section 5.5.5)

enabled evaluations that complied with the interpretivist criterion of coherence which, in turn, increased their accuracy and utility (Stufflebeam, 2001; Beretta, 1992:18).

8.3.5 Reflexive Comments

The first reflexive comment concerns the inability of Lynch's (1996:4) CAM to provide explicit guidelines on a *verification phase* of the education and evaluation context as part of the formative evaluation process. The second and third steps of the model (Lynch, 2003:17-20) form part of a clarification phase (cf. Chapter 4, Section 4.4), but an explicit verification phase is lacking. De Vos (2002:376) include evaluability assessments or pre-evaluations as the second phase in her Integrated Model of Programme Evaluation (IMPE). In the case of the English as LoLT Course, the evaluability assessments involved a verification of the alignment between the teachers' identified needs and the course design (cf. Figure 3, Stage 2a) to ensure coherent evaluations. The verification of the language programme's scope and level (cf. Figure 3, Stage 2b) ensured the appropriateness of the evaluations.

The second reflexive comment explores the interaction between qualitative and quantitative data collection and analysis procedures in the evaluation of the English as LoLT Course implementation phase. The question that arises is whether a mixed evaluation design would be able to pay equal attention to the collection of qualitative and quantitative data and, per implication, to their underlying interpretivist and positivist paradigms. Lynch (2003:28) argues that mixing paradigms is a "daunting task" which runs the risk of compromising one paradigm or the other.

The practical application of a mixed evaluation design in the implementation phase of the English as LoLT Course has illustrated that the collection of qualitative and quantitative data need not pay equal attention to both paradigms. The mixed evaluation design in this case study has illustrated that different combinations or mixes of qualitative and quantitative data are possible, depending on the unique evaluation needs of the context. The particular mix of qualitative and quantitative data in programme monitoring (Figure 3, Stage 3) and in curriculum response analysis (Figure 3, Stage 4) observes the relevance of Creswell's (2003:16) statement that the researcher "nests one form of data within another, larger data collection procedure". The formative goal of curriculum development and of teacher self-development foregrounded the collection of qualitative data in the interpretivist paradigm.

The third comment concerns reflections on the usefulness and relevance of the three evaluation stages in the implementation phase of the English as LoLT Course case

study (cf. Figure 3, Phase 2). The first evaluability assessment (cf. Figure 3, Stage 2a) quality assured the relevance of the English as LoLT Course design to the Intermediate Phase twenty six teachers' identified curriculum needs. The second evaluability assessment (cf. Figure 3, Stage 2b) quality assured the appropriateness of the programme level and scope and ensured the fairness (Lynch, 2003:157) of the portfolio-based assessments.

In addition, the usefulness and relevance of the programme monitoring stage (cf. Figure 3, Stage 3) to the implementation phase of the English as LoLT Course was to assure and ensure that the language programme continuously responded to the needs of the twelve teachers (and the two district officials) who participated in the programme in the workshops, mentoring sessions and assessment activities. The programme monitoring stage also illustrated the advantages of participatory evaluation to increase the internal reliability and validity of the monitoring process.

The comparative analysis of the English as LoLT Course response (cf. Figure 3, Stage 4) to the Intermediate Phase teachers' identified needs (cf. Figure 3, Stage 1b) verified the appropriateness of the language intervention programme for curriculum and teacher self-development in the education context of the four IDDP schools. The writer as evaluator also examined the relevance of the English as LoLT Course curriculum to the OBE policies in the South African context and to the second language learning and teaching theories in the research context of applied linguistics. In addition, the evaluation illustrated the effectiveness of evaluation themes in the language programme evaluation context. These themes increased the validity of the comparative analysis and structured a wealth of qualitative data (cf. Chapter 3, Section 3.3.5).

8.4 Conclusion

This chapter has presented a detailed descriptive evaluation of the English as LoLT Course curriculum response (cf. Figure 3, Stage 4) to the identified needs of the Intermediate Phase teachers (cf. Figure 3, Stage 1b). In addition, the conclusions (cf. Section 8.2) and recommendations (cf. Section 8.2.8) of this descriptive evaluation responded to the formative evaluation goals of curriculum development and of teacher self-development in the implementation phase of this case study (cf. Chapter 7, Section 7.2.1; Section 8.2.9).

The meta-evaluation section of this chapter analysed the ability of Lynch's (1996:4) CAM to guide a valid evaluation of the implementation phase in the English as LoLT Course (cf. Section 8.3). In addition, this section presented reflective comments on the effectiveness of the language programme model to promote a valid and effective evaluation of the English as LoLT

Course. This chapter concluded with reflexive comments on the usefulness and relevance of the three language programme evaluation stages presented in the implementation phase (cf. Figure 3, Phase 2) of this case study.

The effectiveness of the English as LoLT Course response can only be evaluated in the impact assessment phase (cf. Figure 3, Phase 3) of this language programme evaluation. The impact assessment phase is described in Chapter 9.

CHAPTER 9

PHASE THREE: THE IMPACT ASSESSMENT PHASE OF THE ENGLISH AS LoLT COURSE CASE STUDY

9.1 Introduction

The final stage in the evaluation process of this language programme assesses the impact of the English as LoLT Course (cf. Figure 3, Stage 5). This stage forms part of the impact assessment phase in the case study (cf. Chapter 5, Section 5.4.3). In addition, the ability of the Context Adaptive Model (Lynch, 1996:4) to provide effective guidance for a valid impact assessment of the language programme is evaluated in the meta-evaluation section of this phase. Reflexive comments on the effectiveness of the model and on the usefulness of the impact assessment phase of this case study conclude the meta-evaluation section.

This study presents the impact assessment phase in two parts. The first part is presented in this chapter and the second part in Chapter 10. This chapter describes the evaluation methods of the interviews, the questionnaires, programme participants' final examinations and the IDDP curriculum impact survey (i.e. the second observation of teachers). The next chapter presents the interpretation and results of this language programme impact evaluation. The meta-evaluation section follows this impact evaluation in the third part of Chapter 10.

The present chapter is divided into two sections. The first section outlines the purpose and research design of the impact assessment phase. The second section describes the data collection and analysis methods followed in the final stage of the language programme evaluation (cf. Figure 3, Stage 5) to provide a rich database of qualitative and quantitative data sets.

9.2 A description of the Impact Assessment Phase

9.2.1 *The Purpose of the Impact Assessment Phase*

The purpose of the impact assessment phase was to evaluate the effect or impact of the English as LoLT Course on the twelve Intermediate Phase teachers in the education context of the four IDDP schools. Whereas the evaluation of the English as LoLT Course curriculum response (cf. Figure 3, Stage 4) could only assess whether, and how, this language programme responded to the Intermediate Phase teachers' identified needs (cf. Figure 3, Stage 1b), the impact assessment (cf. Figure 3, Stage 5) focused on the effectiveness of these responses. The evaluation goal of this phase was therefore predominantly summative.

De Vos (2002:383) links the effectiveness of an impact evaluation to the concept of *desired change*. She highlights the importance of detecting or measuring change as the outcome of an intervention programme. The purpose of the impact assessment phase was to clearly illuminate the features of the English as LoLT Course which had brought about a measurable change in the identified needs of this intervention programme.

The impact of the English as LoLT Course was considered not only in relation to its own features, but also in relation to its learning and teaching context. The impact assessment traced patterns of cause and effect on the learning milieu. This process relates to what Parlett and Hamilton (1975:148) describe as “spotting patterns of cause and effect within its operation”. The final phase of progressive focusing in illuminative evaluation (Parlett & Hamilton, 1975:148) links with the purpose of the impact assessment phase.

9.2.2 Research Design of the Impact Assessment Phase

Illuminative evaluation is not only linked to the purpose of the impact assessment phase as the overall evaluation research strategy in the English as LoLT Course case study, but it is also used as a mixed evaluation research design or model for the impact assessment phase of the course (cf. Chapter 5, Section 5.3.2). Although Parlett and Hamilton (1975:147) strongly argue for the strategic value of illuminative evaluation in educational programme evaluation, they also provide a detailed description of its use as an evaluation research design or model.

The model (Parlett & Hamilton, 1975:147-150) uses a three-stage framework to investigate, enquire further, and then explain the innovative programme and how it relates to its surrounding context (cf. Chapter 1, Section 5). A comprehensive information profile of the programme impact is assembled using data collected from observations, interviews, questionnaires and tests. This extensive database is then systematically reduced through a process of progressive focusing in order to discern the core features of the programme and their links with one another and with the setting. These features are expressed as evaluation themes.

The impact assessment phase of the English as LoLT Course used the illumination model (cf. Parlett & Hamilton, 1975; Lynch, 2003; Patton, 1990) as its research design. The process of progressive focusing investigated the comprehensive database to identify the most effective programmatic features.

The first set of qualitative and quantitative data which informed the comprehensive information profile was collected from interviews conducted with primary stakeholders of

the evaluation audience. In addition, clarifying information on interviewees' responses was collected through questionnaires. Programme participants' final examination output also formed part of the data. The IDDP curriculum impact survey provided a dataset of the English as LoLT Course impact on the twelve Intermediate Phase teachers of the four IDDP schools who participated in the language programme.

The data were collected during consecutive assessment rounds from September to December 2004. The impact assessment phase used a mixed evaluation research design with sequential and concurrent data collection procedures to develop a composite profile of programme effectiveness related to its curriculum and to its education context.

Both Lynch (2003:25) and Patton (1990:119) refer to illuminative evaluation as a qualitative evaluation research model. However, Lynch (1996:82-84) views illuminative evaluation as a mixed evaluation design.

The illumination model was applied as a mixed evaluation research design in the impact assessment phase of the English as LoLT Course. The application of the model to the data collection and analysis procedures is described in the next section.

9.3 Programme Evaluation Stage 5: Data Collection and Analysis Procedures in the Impact Assessment Phase

9.3.1 Impact Assessment Interviews

9.3.1.1 Purpose

The interviews were held to establish whether, and to what extent, the English as LoLT Course had made a difference to the twelve Intermediate Phase teachers' learning and teaching practices, especially to the way in which they used English as the language of learning and teaching.

9.3.1.2 Method of Research

Design

The mixed evaluation design of the illumination model (Lynch, 1996: 82 – 84) was used, as discussed above (cf. Section 1.2).

Participants

The following stakeholders of the primary evaluation audience were interviewed:

- Six of the teachers who participated in the course
- The two district officials
- One provincial official
- The course moderator

The writer selected persons who could offer special insights into the impact of the English as LoLT Course. Lynch (1996:83) refers to this process as “theoretical sampling”. Six teachers and two district officials who participated in the English as LoLT Course were interviewed by the researcher. The teachers were selected as follows: Two teachers who did very well in the course, two teachers who fared reasonably well and two teachers who fared badly. They participated in small group interviews. The two district officials who had participated in the course were also interviewed to provide their insights from a district support perspective. In addition, an official responsible for the Intermediate Phase at provincial level was interviewed to provide a provincial support perspective on the impact of the English as LoLT Course. This official had participated in the IDDP curriculum baseline and impact survey and had received quarterly IDDP progress reports. The moderator of the course was interviewed for his insight into the course impact. The moderator played a significant role in the IDDP curriculum baseline and impact surveys. He participated in the classroom observations and interviews. He also participated in the conceptualisation, design and continuous monitoring and evaluation of the English as LoLT Course (cf. Chapter 7, Section 7.4.2.1).

The Sacred Heart College Research and Development (SHC R&D) implementation team participated in an informal, conversational interview which preceded their input in the design of the interviews used for the stakeholders of the primary evaluation audience. The SHC R&D team (cf. Chapter 3, Section 3.2.1.1) reflected on the impact of the English as LoLT Course on the programme participants, as well as on their own development. They provided input on the difference that the conceptualisation, design, implementation, monitoring and evaluation of the course had made to their understanding of course design and implementation.

Instrumentation

The writer developed the interview format and questions in collaboration with the SHC R&D implementation team (cf. Appendix K). The course moderator also provided input in the development of the interview format. The wording and the sequence of the interview questions were determined in advance. The interview format was structured. This format allowed for the concurrent collection of qualitative and quantitative data. Standardised questions were followed by open-ended sections

to elicit free responses. Lynch (1996:127) and Patton (1990:288) refer to this type of interview design as the “standardised open-ended interview” which appears at the structured end of the qualitative interview continuum.

The interview was divided into three sections. The questions were based on the main course features and evaluation themes that had emerged from the needs and implementation assessment phases of the case study. The first section wanted to establish if, and why, the English as LoLT Course had made a difference to teachers’ OBE classroom practices. The second section mainly wanted to know if, and why, the course content on language learning and concept transfer was useful to the programme participants. The third section explored interviewees’ general perceptions on the effectiveness of the English as LoLT Course. The interviewees were asked to identify the most useful knowledge and skills learnt from the course. They were also asked to reflect on the value of the course to themselves as life-long learners. The final question invited the interviewees to add to their reflections to the questions already discussed or to any other aspect of the English as LoLT Course.

Although the structure and the questions of the interview were standardised, the wording of the questions elicited interviewees’ own responses (cf. Appendix K). The writer as evaluator asked the same questions on the effectiveness of the English as LoLT Course to the teachers, as well as to the two district officials, the provincial official and the moderator. However, the questions asked to the departmental officials and to the moderator focused on their support and monitoring interest in the impact evaluation. .

Data Collection Procedure

The writer held small group interviews with the six teachers and two district officials on 19 and on 20 October 2004. The interviewer conducted three on-site interviews with two teachers at each school on 19 October 2004. The on-site interview with the two district officials took place on 20 October 2004. Eight of the fourteen programme participants were interviewed. The provincial official was interviewed on 13 December 2004 at the provincial office in Bloemfontein. The moderator was interviewed on 4 February 2005.

The interviewees signed a letter of consent at the beginning of the recorded interview (cf. Appendix L). The interviewees agreed that they could be interviewed and that their responses could be recorded (cf. Cassette recordings in possession of the writer).

The informal, conversational interview with the SHC R&D implementation team was held on 3 August 2004. Field notes were taken of interviewees' responses.

Data Analysis

Lynch (2003:135-147) provides detailed guidelines on the analysis of interpretivist or qualitative evaluation data. A description of four of the five stages in interpretivist data evaluation is presented in this section. The fifth stage of data interpretation, which describes the findings of the data analysis, is presented as part of the evaluation in Chapter 10 (cf. Section 10.3). The four stages presented in this chapter are: focusing, data organisation, coding and classification, as well as data reduction.

Stage 1: Focusing; Reviewing the Thematic Framework

The writer reviewed the seven preliminary evaluation themes (cf. Chapter 4, Section 4.3) identified during the third step of Lynch's (1996:4) CAM. Lynch (2003:135) defines a theme as "an issue that surfaced in the process of negotiating your entry to the setting and/or during the gathering of data". The themes summarise the evaluator's knowledge about the setting or context in relation to the evaluation goals, problems and questions.

The seven preliminary evaluation themes of the English as LoLT Course examined the following issues: tension between policies on and classroom implementation; English language learning and teaching needs; teacher and learner motivation and attitude towards learning and teaching; management support to the implementation of English as the LoLT; the role and status of English in the project schools; the role and status of Intermediate Phase teachers in curriculum decisions and the role and status of English in the Phuthaditjhaba community.

Stage 2: Data Organisation

The interviewer checked the data for completeness. One interview tape that contained the end of the second interview and the beginning of the third interview was damaged. However, the interviewer had summarised interviewees' responses during the interviews. These summaries were incorporated into the transcribed text. The information on the tapes was correlated with the summarised interviews and with the transcriptions to ensure that key information was transcribed. An electronic filing system and a hard copy filing system were created.

Lynch (2003:37) refers to several examples of electronic databases that could be used to organise and analyse the data, including the N6 or NUD*IST software

programme (QSR, 2002). The writer was able to use the N6 software programme. This database has a built-in organisation system. The transcribed interviews were converted into text files, which were stored in the 'rawfiles' folder of the N6 electronic database. The writer mainly used the electronic database of the N6 programme (QSR, 2002) for easy access of the qualitative data in the transcribed database. The writer also used the N6 database to do searches of key words and phrases such as *content vocabulary* and *assessment* and to explore relationships of proximity, union and difference among the text files. In addition, the writer did matrix searches to establish the use of a key word or phrase from the various perspectives of the *primary evaluation audience*. The effectiveness of the N6 is discussed in Chapter 10, Section 10.4.2.

Stage 3: Data Coding

The interview text was reviewed electronically, as well as on printed copies of the transcribed tapes. The writer recorded memos or reflections on the text in the N6 database for potential data interpretation. Annotations to draw the writer's attention to interesting features in the text were also inserted in the text. The memos and the annotations were recorded in the N6 database. The memos were indicated with a ! sign on the electronic database.

The writer kept the thematic framework in mind in the identification of codes. Lynch (2003: 138) defines a code as "markers or labels that summarize how particular pieces of the data relate to larger ideas". Key words and brief phrases in the text were highlighted to code free or *in vivo* nodes in the N6 database (cf. Figure 6). The writer selected the line as the smallest text unit type of analysis. The lines in which the key words or brief phrases appeared were then linked to the nodes. These nodes formed the core of the interpretivist analysis. A total number of 82 nodes were created during four rounds of text analysis. The 82 free nodes were linked to the preliminary evaluation themes in order to reduce and summarise the interview data. Lynch (2003:139) suggests that the code should combine brevity and transparency. The form of the code should be short enough to be a time-saving data marker or label. The code should also be immediately interpretable and clear in order to be transparent. The writer generated a list of abbreviated labels (see below) for the evaluation themes of the English as LoLT Course by reviewing the free nodes in relation to the thematic evaluation framework of the language programme.

This review process resulted in the reduction of the seven evaluation themes to four. The theme on the role and status of English in the project schools, the theme on the

role and status of English in the Phuthaditjhaba community and the theme on management support to the implementation of English as the LoLT were combined. All of these evaluation themes contributed to the creation of a supportive context for the use of English in the learning *milieu*. The merged evaluation theme was labelled as *Milieu* in the electronic classification (cf. Figure 6). The theme was abbreviated as *MIL* in the data analysis of the hard copy interview transcriptions.

The evaluation theme on the tension between *policies* on OBE and classroom *practice* was labelled: *Policy vs practice* and abbreviated: *POL/PRAC*. The evaluation theme on mixed levels of competency and proficiency in using English as the LoLT examined the use and usage of the home language, the first additional language and the language of learning and teaching. This theme focused on the development of competencies and proficiency in *languages*. The theme was labelled: *Languages* and abbreviated: *LS*.

The evaluation theme on teacher and learner motivation and attitude towards learning and teaching asked questions about the impact of the language programme on teacher and learner *relationships* towards English as the LoLT. This theme was labelled: *Relationships* and abbreviated: *RELAT*. A new theme emerged from an analysis of key words in the interviews. This evaluation theme was linked to the *evaluation* of the course impact on the primary evaluation audience. The theme was labelled: *Evaluation* and abbreviated: *Eval*.

The evaluation themes were coded as top level tree nodes in the N6 database. Each evaluation theme had its own tree node, which consisted of relevant free nodes linked to the tree node. Once the free nodes were linked to the top level tree nodes, their status changed from free nodes to tree nodes. The tree nodes had titles linked to the key words, for example: "glossary". The tree nodes were numbered as they were entered into the N6 database. The numbers of the tree nodes were used as their addresses.

Stage 4: Data Classification

The writer started classifying or grouping the data in order to identify underlying patterns. Text searches of the electronic nodes and of the printed interview transcripts were conducted. The purpose of the text searches was to access and review the data linked to the tree nodes. Eighteen text searches were conducted during this stage (cf. Figure 7). The electronic text searches revealed frequency patterns of key words or phrases. The node "change" was, for example, found

eleven times in six of the seven database documents (cf. Appendix Q, Report 1). The data search revealed an 86% presence of the “change” tree node in the interview transcripts. However, the node “parents” only appeared four times in two of the seven documents and therefore only had a 29% presence in the database.

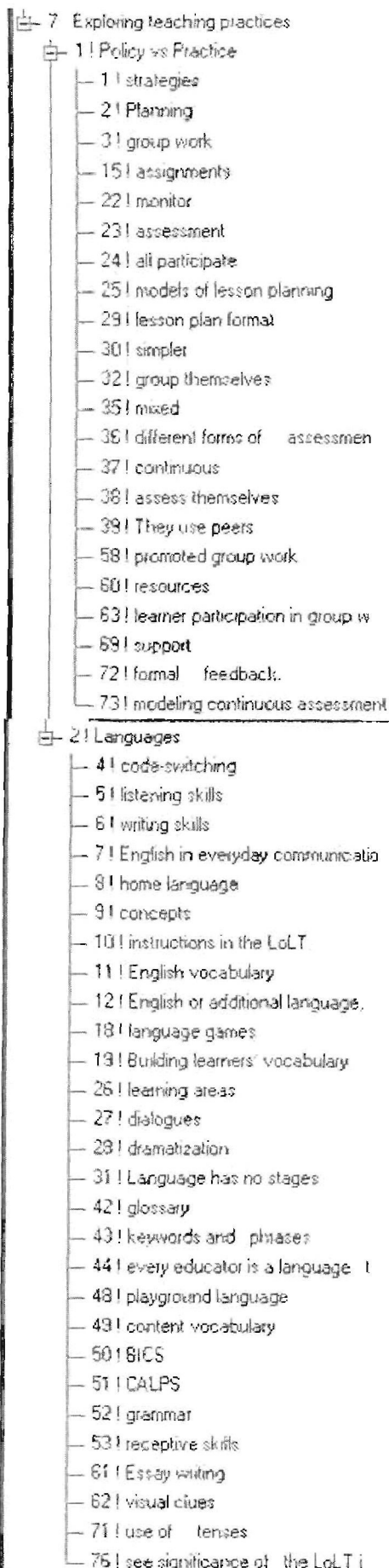
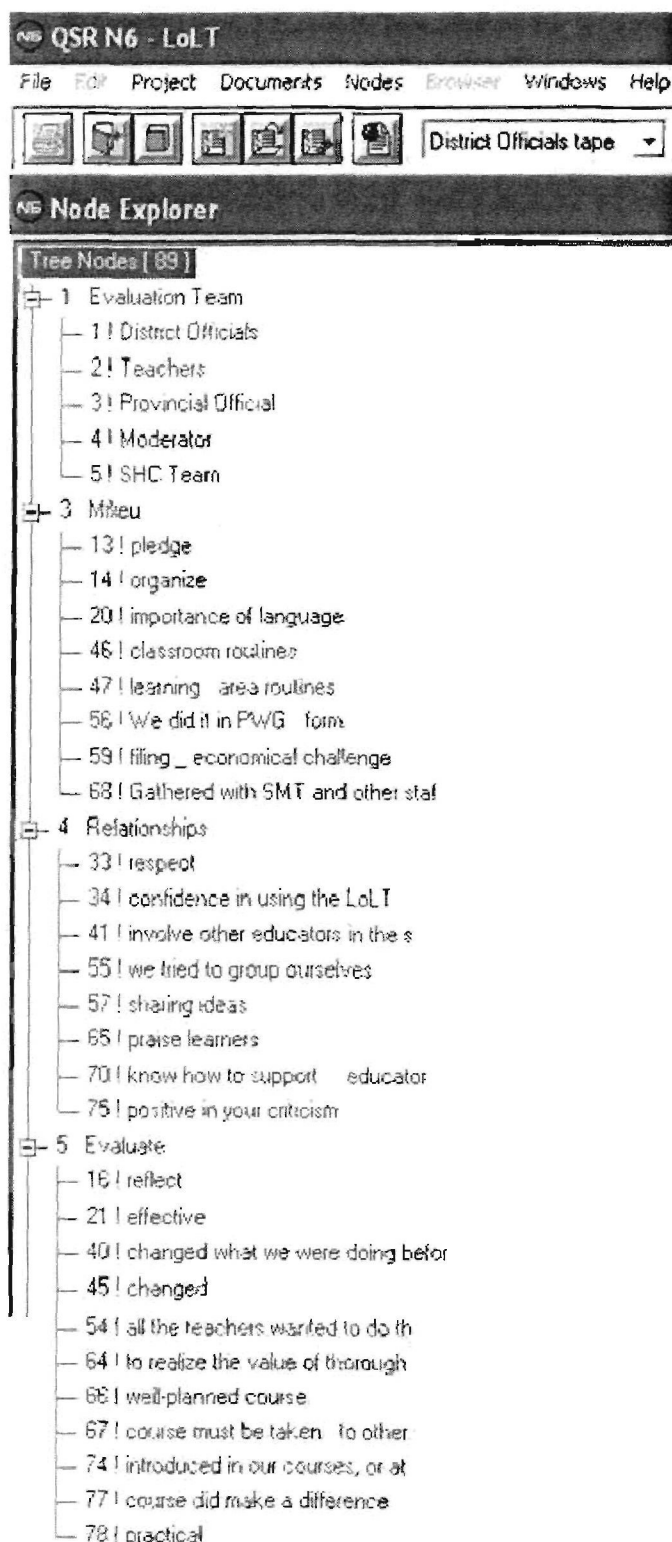
In addition, the writer searched for various combinations of the codes and the data sources to compare responses (cf. Appendix Q). These searches were done at the tree node level. Twenty three node searches were conducted (cf. Figure 6). The node searches explored the overlap between nodes related to planning. The writer found examples such as *simpler, lesson plans and models of lesson planning* (cf. Appendix Q, Report 2). The node searches explored the differences between the nodes, for example the differences between *English in everyday communication* and *home languages*. The writer found one example (cf. Appendix Q, Report 3). The node searches also examined the relationships between the nodes by searching for proximities. The proximity between *planning* and *strategies* in the text was explored. One example of proximity was found (cf. Appendix Q, Report 4). The union of nodes on assessment was also examined. Eight similarities or unions of nodes were discovered. Key words and phrases such as *monitor, different forms of assessment, and they use peers* formed patterns of similarity in interviewees’ responses (cf. Appendix Q, Report 5).

In addition, the writer conducted matrix searches in the N6 database. The writer wanted to ensure that the different perspectives or voices of the evaluation audience were explored in relation to the underlying patterns. A top tree node labelled *Evaluation Team* was created in the N6 database. Tree nodes were linked to the transcribed texts of the district officials, the teachers, the provincial official, the moderator and the SHC R&D implementation team.

The matrix search required the creation of collect nodes to allow for the qualitative cross tabulation of key word and phrases in the tree nodes. The writer refined the classification of the evaluation themes. The top-level tree nodes labelled as *Policy vs Practice* and *Languages* became collect nodes of a new top-level tree node labelled *Exploring teaching practices*. Eleven matrix searches were conducted and the results of five matrix searches were kept in the N6 report folder (cf. Appendix Q, Report 6). The five matrices traced the intersection of the tree nodes attached to each evaluation theme and the full text interview transcripts of the teachers, district and provincial officials, the moderator and the SHC R&D implementation team.

The qualitative data search called up all the references to the tree nodes related to a particular evaluation theme in relation to the various perspectives of the evaluation theme on the key word or phrase in the tree node. The matrix research report on the theme of evaluation reflected, for example, perspectives on the tree nodes *change* and *difference* from the perspectives of the teachers, the district officials and the moderator (cf. Appendix Q, Report 6). The qualitative description of the reference is immediately available from the line unit text linked to the tree node. Figure 7 presents a screenshot of the tree nodes classification.

Figure 7: Screenshot of Tree Nodes Classification



The electronic process followed in the analysis of the transcribed interview text was complemented by an analysis of the transcribed text on hard copy printouts. The abbreviated codes of POL/PRAC, LS, MIL and RELAT and EVAL were used. The themes were colour coded to facilitate the identification of code combinations and relations. The text analysis moved between sentences, paragraphs and full texts as units of analysis. This process added a richer dimension to the exploration of salient English as LoLT Course features and causal relations between the evaluation themes.

9.3.2 Impact Assessment Questionnaires

9.3.2.1 Purpose

The purpose of the questionnaires was to support, qualify and verify the information provided in the interview data collected during the small group interviews on the impact of the English as LoLT Course.

9.3.2.2 Method of Research

Design

The questionnaires followed the mixed evaluation design of the structured interviews. They allowed for the concurrent collection of qualitative and quantitative data (cf. Appendix M).

Participants

The teachers who participated in the small group interviews completed the questionnaires. The two district officials, the provincial official and the moderator also completed the questionnaires. In addition, the writer asked the six teachers who were not interviewed to complete the questionnaires as well. Five of the six teachers completed the questionnaire. A total number of eleven teachers therefore completed the questionnaires (cf. Appendix N).

Instrumentation

The teachers' questions followed a similar wording and sequence to the interview questions to ensure the collection of supportive and clarifying data (cf. Appendix M). The writer as evaluator adjusted the same questions asked to the teachers to suit the support and monitoring perspective of the two district officials, the provincial official and the moderator.

Data Collection Procedure

The questionnaires were completed and collected on the same days as the interviews. Comments or additional insights which programme participants did not share during the interviews were provided. The programme participants who were not interviewed were requested to return the questionnaires during the same week of data collection in Phuthaditjhaba. The data collection was therefore concurrent and sequential. Eleven out of twelve questionnaires were returned.

Data Analysis

A 4-point Likert quality rating scale was used to measure the degree of change perceived by teachers, district officials and the provincial official in teaching practices (cf. Appendix M: Question 1). Percentages and averages of the Intermediate Phase teachers' responses to the items were analysed on an Excel spreadsheet (cf. Appendix N: Spreadsheet 1). Ten of the eleven teachers responded to this question. The rating scale contained an open-ended question which asked programme participants to rate other changes which they would like to specify. These changes were described, but not analysed quantitatively as only five of the eleven respondents offered additional comments. The comments were analysed as narrative comments. The factual, yes-no alternative answer which preceded the quality rating scale was analysed according to percentages.

A 4-point Likert quality rating scale in Question 2 was analysed to measure the usefulness of specific English as LoLT Course programme features. Percentages and averages of teachers' responses to the items were analysed on a separate Excel spreadsheet in the same note book (cf. Appendix N: Spreadsheet 2). The eleven teachers who completed the questionnaire responded to this question. A factual, yes-no alternative answer also preceded this rating scale. Programme participants' narrative comments on the effectiveness of the English as LoLT Course were analysed in Questions 3 to 8 of the questionnaire (cf. Appendix M).

9.3.3 Programme Participants' Final Examination Data

9.3.3.1 Purpose

The purpose of the final examination data was to provide supportive evidence to the interview data collected during the small group interviews on the impact of the English as LoLT Course.

9.3.3.2 Method of Research

Design

A mixed evaluation design allowed for the collection of qualitative and quantitative data. The design allowed for concurrent and sequential data collection procedures.

Participants

The twelve teachers and two district officials, who followed the course over a period of eighteen months, participated in the final examination. Although the programme participants had remained the same during the course, the grades and the learning areas in which they taught varied from 2002 to 2004. All twelve teachers taught in the Intermediate Phase; two of these teachers also taught in the Senior Phase. Eleven teachers were teaching English as a first additional language, one taught Natural Sciences, two taught Economic Management Sciences and two taught Human and Social Sciences in addition to English as a first additional language.

The two district officials from the Inclusive Education sub-directorate continued providing support to the Intermediate and Senior Phase teachers of the Thabo Mofutsanyana District in the Languages, Mathematics and Life Skills learning areas. They also continued supporting teachers to develop learning and teaching strategies for learners with barriers to learning.

Three members of the SHC R&D implementation team observed and evaluated the practical part of the final examination. The course mentor (cf. Chapter 3, Section 3.2.1.1) invigilated the theoretical part of the final examination. This part was also evaluated by the SHC R&D implementation team. The moderator of the English as LoLT Course moderated programme participants' scripts marked by two members of the SHC R&D implementation team.

Instrumentation

The final examination consisted of two parts: a practical application part and a theoretical part (cf. Appendix O). Programme participants had to demonstrate the application of their understanding, knowledge and skills acquired in the English as LoLT Course to facilitate a learning experience in the first part.

The SHC R&D implementation team (cf. Chapter 3, Section 3.2.1.1) designed the LoLT Lesson Observation Sheet (cf. Appendix P). This observation scheme had five categories. The first category required general information about the school, the grade, the learning area, the topic of the lesson and the name of the course

participant who presented the lesson. The second category required information about the lesson plan. Observers had to indicate with a tick whether the participant had submitted a lesson plan; whether the participant followed the plan during the lesson presentation and whether learners used notebooks. The third category required information about the language learning environment. Observers had to tick whether the participants created a supportive language learning environment by providing posters; a reading corner; labels in different languages and vocabulary flashcards in the classroom. Observers also had to note if participants provided additional language learning support material. The fourth category required information about the success of the lesson. Observers had to tick whether the lesson was successful or not. They had to motivate their response. The fifth category required descriptions and comments on the participants' use of English language learning techniques during the lesson presentation. The validity and reliability of this observation scheme is critically discussed in the meta-evaluation section of the impact assessment phase (cf. Chapter 10, Section 10.5).

The practical part of the examination was followed by the theoretical part (cf. Appendix O). Programme participants had to provide evidence of what they had learnt about the role of language in learning, especially in the context of English as the LoLT. They had to write an essay on the topic. The theoretical part was an open book examination. Marking guidelines were provided to standardise the assessment of learner output. The programme participants submitted their essays after two hours.

Data Collection Procedures

Candidates' practical lesson presentations to Intermediate and Senior Phase learners and to the SHC R&D implementation team took place on 12 and 13 October 2004. The practical presentations were videotaped. The tape was converted into a digital video disc (DVD) for the purpose of this study (cf. DVD in possession of the writer). A LoLT Lesson Observation sheet (cf. Appendix P) was used to capture the data. Two SHC R&D implementation team members observed the lesson presentation of each programme participant. As previously mentioned (cf. Chapter 6, Section 6.2.6.2), the use of observation teams ensured that two observers rated the same lesson in all cases in order to increase the reliability of the observation. The observers discussed their ratings after each lesson observation and then averaged their scores.

The theoretical part of the final examination took place on 18 October 2004. The duration of the examination was two hours. An essay was written on what the English as LoLT Course had taught programme participants on the use of language in their classroom practice. The essays were invigilated and collected by the course mentor. Two of the SHC R&D implementation team members marked a programme participant's essay. The score was again averaged to increase its reliability. The moderator also assessed the candidates' essays that were submitted for the theoretical part of the examination. The process of double marking further increased the reliability of the data.

Data Analysis

The SHC R&D implementation team used the LoLT Lesson Observation Sheet (cf. Appendix P) to assess participants' competencies in lesson planning and in following their lesson plans during the lesson presentation; in creating a supportive language learning environment; in presenting a successful lesson and in effectively using English language learning techniques during their lesson presentations. Evidence of homework sheets and the lesson plan used for the lesson presentation was also analysed. This evidence substantiated the assessment of the participants' lesson presentations that were scored out of 50.

The SHC R&D implementation team assessed participants' knowledge and insight into the use of English as the LoLT in their classroom practice. They had to write an essay on this topic. The essay was scored out of 50. Learner output in the final examination was assessed out of 100 and added to the 100 marks of the mid course examination. This mark out of 200 was then converted to a final examination mark out of 45 on the cumulative mark sheet. (cf. Appendix I). The formative assessment of learner output totalled 55 marks and was added to the summative assessment score out of 45.

The writer conducted a content analysis of the final examination data, SHC R&D lesson observations and lesson plans of the eight programme participants who participated in the small-group interviews. In addition, the writer analysed the DVD that showed excerpts from the interviewees' lesson presentations. The technical quality of the video was poor, especially at the beginning. The writer analysed teachers' videotaped lesson presentations by first reading the assessments and comments of the SHC R&D examiners on the LoLT lesson observation sheets. These videotaped presentations were converted and transferred to a digital video disc (DVD). The writer then observed the excerpts of the lesson presentations on the

DVD. The writer finally compared the notes of the excerpts with the comments of the team and with the participants' final examination scores (cf. Appendix I).

9.3.4 IDDP Curriculum Impact Survey

9.3.4.1 Purpose

The purpose of the IDDP Curriculum Impact Survey was to measure the impact of the English as LoLT Course on the twelve Intermediate Phase teachers who participated in the language programme.

9.3.4.2 Method of Research

Design

A cross-sectional survey design was used. This survey design allowed for the concurrent collection of qualitative and quantitative data. This survey design was therefore a mixed evaluation design.

Participants

The twelve Intermediate Phase teachers of the four IDDP schools who participated in the English as LoLT Course were observed over a period of two days. A total of eight observers took part in this study, and they represented the North-West University School of Languages, the Free State Department of Education (FS DoE) and Sacred Heart College Research and Development Unit (SHC R&D). They were the same observers that participated in the IDDP curriculum baseline survey (cf. Chapter 6, Section 6.2.6.2). This consistency in observer participation was aimed at increasing the reliability of this second observation.

The observers were randomly divided into four teams, each team consisting of two members. Each team went to the same school during the two-day period. Two team members observed and assessed each teacher.

Instrumentation

The observation questionnaire devised for the initial baseline survey was also used for the follow-up survey (cf. Chapter 6, Section 6.2.7.2). The reliability of the sub-scales of the questionnaire was determined by means of Cronbach's alpha (cf. Mostert *et al.*, 2004:5, Table 1). The reliability was calculated when the results were analysed. The reliability of the sub-scales were as follows: Written lesson preparation (0.91), lesson presentation (0.87), Atmosphere and relationships (0.95), learner experience (0.84), resources (0.94), achievement of learner progress (0.83),

professionalism (0.95), use and usage of the English language and proficiency (0.86), teacher planning and organisation (0.86) and learner output and monitoring (0.90). The reliability of the sub-scales therefore was quite good, as Weir (2005:29) states that a reliability estimate of 0.8 is normally considered the minimum acceptable level.

Data collection procedure

The data were collected on 13 and 14 September 2004. Each team visited the same school on two consecutive days to ensure minimum disruption in terms of strange faces in classrooms. As previously mentioned (cf. Chapter 6, Section 6.2.6.2), the evaluation team made this arrangement to increase validity of their findings through minimising the positivist validity threats of the *observer's paradox* and the Hawthorne effect (Mackey & Gass, 2005:176).

To ensure that all observers again understood and interpreted the questionnaire in the same way, a benchmarking session of three hours was held prior to the actual data collection at the schools. The purpose of this session was to increase the reliability of the data collection.

Two observers assessed each teacher's lesson presentation. As mentioned before (cf. Chapter 6, Section 6.2.6.2), the use of an observation team of at least two raters per class controlled the inter-rater reliability of the observation scales operationally (Mackey & Gass, 2005:358; McNamara, 1996:117).

After each day of observation, all observers met for a feedback session. The purpose of these sessions was further to improve the reliability of the data collection through a standardisation process. It ensured that all observers were still observing the same thing and in the same manner. The observers also discussed problems that occurred during observation. The writer as project manager coordinated these standardisation meetings. The writer as researcher participated in the discussions that were led and monitored by a professor from the North-West University.

Data Analysis

The data of the IDDP curriculum impact survey were analysed quantitatively (i.e. means, standard deviations, frequency counts, percentages) as well as qualitatively (i.e. narrative reporting by observers). A description of the quantitative data analysis follows.

Cohen's (1988) effect size d was calculated to establish whether the means between Observation 1 and Observation 2 differed significantly in practice. Steyn and Ellis (2006: 172-173) point out that effect size indexes such as Cohen's can be used to determine how important or practically significant the differences between means are that have been established by using a non-standardised Likert-type scale (such as the one used in this study). Cohen (cf. 1988) provides the following guidelines for the interpretation of the d -values:

$d = 0,2$ indicates a small effect.

$d = 0,5$ indicates a medium effect.

$d = 0,8$ indicates a large effect.

No p -values were calculated, because there was no sampling and no intention to generalise these findings to a larger population (e.g. all the teachers in the schools or district) (cf. Steyn & Ellis, 2006: 175; Seliger & Shohamy, 1989: 220).

9.4 Conclusion

This chapter has outlined the purpose and research design of the impact assessment phase in the English as LoLT Course case study in the first section. The second section described the data collection and analysis methods followed in the impact analysis (cf. Figure 3, Stage 5) of this language programme evaluation.

The results of the quantitative analysis of the IDDP curriculum impact survey are presented in the next chapter. A predominantly interpretivist evaluation (Lynch, 2003:25) of the English as LoLT Course impact assesses the effectiveness of the language programme according to evaluation themes in the next chapter. The results of the quantitative impact analysis of the English as LoLT Course on the twelve Intermediate Phase teachers are integrated in the descriptive evaluation of the English as LoLT Course impact in the next chapter.

In addition, a meta-evaluation section evaluates the effectiveness of Lynch's (1996:4) CAM to guide a valid evaluation of the English as LoLT Course impact. Reflexive comments on the effectiveness of Lynch's (1996:4) CAM and on the usefulness and appropriateness of the impact assessment phase in this case study conclude the meta-evaluation section in Chapter 10.

CHAPTER 10

PHASE THREE (CONTINUED): THE IMPACT ASSESSMENT PHASE OF THE ENGLISH AS LoLT COURSE CASE STUDY

10.1 Introduction

This chapter presents and interprets the results of the English as LoLT Course impact assessment. The results derive from the purpose, research design and method of research of the impact assessment phase described in Chapter 9. The quantitative and qualitative data of the interviews, questionnaires, programme participants' final examinations and the IDDP curriculum impact survey form a comprehensive data base. The writer as evaluator and as researcher uses the database to present and interpret a composite profile of the effectiveness of the English as LoLT Course in this chapter.

This chapter consists of four sections. The first section presents the results of the quantitative data analysis in the IDDP curriculum survey from a positivist evaluation perspective (cf. Lynch, 2003:24-25). The results from this quantitative data analysis are integrated, or *nested* (Creswell, 2003:16) (cf. Chapter 5, Section 5.3.1) in the predominantly qualitative descriptive evaluation of the language programme impact in the third section of this chapter.

The second section presents the thematic framework for the presentation and interpretation of the comprehensive impact assessment database from an interpretivist evaluation perspective (Lynch, 2003:25). The final review process of the evaluation themes to provide this evaluation framework form part of the progressive focusing process in illuminative evaluation (cf. Parlett & Hamilton, 1975:148). The identification of the final evaluation themes already form part of data interpretation in interpretivist evaluation (Lynch, 2003:144). These evaluation themes structure the interpretation of the comprehensive database to present convincing impact assessment conclusions.

As previously explained (cf. Chapter 5, Section 5.3.2; Chapter 9, Section 9.2.2), the illumination model informs the evaluation design of the impact assessment phase in this case study. The interrelatedness of the course and the learning and teaching context (cf. Chapter 5, Section 5.3.2) continues to be highlighted in the impact assessment phase.

The third section presents the evaluation of the language programme impact (cf. Figure 3, Stage 5). The writer interprets and explains the effectiveness of the language programme in the focus areas of OBE planning, learner participation and assessment. Its effect on the development of the Intermediate Phase teachers' use of English as the LoLT is described as a

core focus area (cf. Figure 6). In addition, the impact of the course on the learning milieu is assessed in relation to these focus areas.

The fourth section of this chapter evaluates the ability of Lynch's (1996:4) CAM to validate a convincing impact assessment of the English as LoLT Course. Reflexive comments on the effectiveness of this language programme model and of the impact assessment phase in this case study conclude the meta-evaluation section.

10.2 Results of the Quantitative Analysis of the IDDP Curriculum Impact Survey

The results derive from a comparison of descriptive statistics between the IDDP curriculum baseline and impact surveys. The intention of the analysis, viewed from a positivist paradigm (Lynch, 2003:28), was to measure whether there had been an improvement in the competencies of the twelve Intermediate Phase teachers of the four IDDP schools who participated in the English as LoLT Course, and whether any improvement could be regarded as significant in practice.

Table 8 presents the results from a quantitative, comparative analysis of the descriptive statistics of the IDDP curriculum baseline and impact survey.

Table 8: Comparative Analysis: Twelve Teacher Participants

Variable	N	Observation 1		Observation 2		Effect size
		Mean	Std. Dev.	Mean	Std. Dev.	
Planning & organization	12	2,75	0,89	4,27	0,46	1,71 ***
Written lesson preparation	12	3,21	1,24	4,15	0,52	0,85 ***
Lesson presentation	12	3,45	0,71	4,27	0,44	0,76 **
Usage of English	12	3,68	0,61	4,16	0,42	1,15 ***
Learner output & monitoring	12	3,36	0,70	4,54	0,51	0,79 ***
Atmosphere & relationships	12	4,01	0,75	4,62	0,39	0,72 **
Learner experience	12	3,22	0,83	4,09	0,45	0,81 ***
Language proficiency rating	12	3,78	0,66	4,02	4,02	0,35 *
Professionalism	12	4,37	0,64	4,69	0,45	0,69 **
Key: * small effect ** medium effect *** large effect						

Table 8 indicates that there was a practically significant difference between the mean scores of the first survey and the mean scores of the second survey. All categories, but one, differed with a medium to large effect size.

The descriptive statistics (cf. Table 8) indicate that The English as LoLT Course had a large effect on the classroom practices of the twelve Intermediate Phase teachers in the following categories: planning and organisation, the usage of English, learner output and monitoring and learner experience. These categories show a remarkable improvement. In addition, this language programme also had a medium effect on written lesson preparation, professionalism and atmosphere and relationships. These categories also showed an improvement. The language proficiency rating of the teachers also showed an improvement, although a slighter one in comparison to the improvements in the other categories.

These results provide statistical evidence that the English as LoLT Course made a positive impact on the twelve Intermediate Phase teachers of the four IDDP schools who participated in the language programme. As previously mentioned in the introductory section of this chapter, the writer has integrated, or *nested* (Creswell, 2003:16) (cf. Chapter 5, Section 5.3.1) the results from this quantitative data analysis in the IDDP curriculum impact survey in the predominantly qualitative descriptive evaluation of the English as LoLT Course impact in Chapter 10.

10.3 Final Data Review Process to Shape the Thematic Framework

Lynch (2003:144) explains that the process of data interpretation starts in the act of coding, classifying and reducing the data. Parlett and Hamilton (1975:148) refer to this process as *progressive focusing*. The presentation of this impact evaluation (cf. Figure 3, Stage 5) was informed and shaped by a final review process of the evaluation themes.

The writer conducted a final review of the electronic classification system and data displays created by the N6 matrix searches. The writer then reviewed the four evaluation themes (cf. Chapter 9, Section 9.3.1.2) and considered the way in which these themes would interact in the impact assessment. Three major evaluation themes emerged from this review process. They were: the exploration of the course impact on teaching practices; the link between the course impact on the teaching practices and the learning milieu, and the way in which different interests or perceptions of the evaluation audiences of the course impact on the teaching practices and the learning milieu. These evaluation themes formed a new level of top tree nodes (cf. Figure 8).

The writer continued to group the existing top tree nodes according to their relevance to the new top tree nodes. The tree nodes attached to each evaluation theme remained attached to their top tree nodes. The addresses of the tree nodes remained the same although their clustering was affected by the revised dynamics of the evaluation interaction. A more detailed explanation of the tree node display in Figure 8 follows.

10.3.1 *The Impact Assessment Theme*

The theme on evaluation (cf. Figure 8: Top Tree Node 5) focused the impact assessment. The descriptive evaluation focused on whether, and to what degree, the English as LoLT Course had brought a detectable or measurable change (De Vos, 2002:383). The fundamental evaluation questions asked were, "What difference did the English as LoLT Course make?" and "How useful was the English as LoLT Course?" These questions were asked from various perspectives of the primary stakeholders in the interview evaluation audience. The questions had the summative evaluation goal of quality assurance in common (cf. Chapter 3, 3.2.1.4; Chapter 9, Section 9.2.1.1).

The writer clustered the theme labelled *Evaluation* (cf. Figure 8: Top Tree Node 5) and the theme labelled *Evaluation Audience* (cf. Figure 8: Top Tree Node 1). The writer created a new Top Tree Node labelled *Impact Assessment* (cf. Figure 7: Top Tree Node 3). The descriptive evaluation used this focus to explore the most effective changes in teaching practices in relation to the learning milieu as perceived from the multiple perspectives of the evaluation audience.

10.3.2 *The Teaching Practice Theme*

The difference and usefulness of the English as LoLT Course was explored in relation to the teaching practices of the programme participants (cf. Figure 8: Top Tree Node 7). The impact of the language programme was assessed in relation to the participants' general understanding and application of policies on OBE (cf. Figure 8: Sub Node 7.1). The impact of the language programme was explored in relation to the specific application of their understanding of language acquisition and concept transfer for the effective use of English as the LoLT (cf. Figure 8: Sub Node 7.2). The impact assessment of the English as LoLT Course according to this cluster of evaluation themes is linked to one of the core concepts in illuminative evaluation namely to the *instructional system* (Parlett & Hamilton, 1975:144). This system includes "a set of pedagogic assumptions, a new syllabus, and details of techniques and equipment".

10.3.3 The Learning Milieu Theme

In addition, the impact of the English as LoLT Course was explored in relation to the learning milieu. The writer clustered the evaluation themes labelled *Milieu* (cf. Figure 8: Top Tree Node 3) and *Relationships* (cf. Figure 8: Top Tree Node 4) to trace the impact of the English as LoLT Course on the learning milieu. A new Top Tree Node labelled *Learning Milieu* was created (cf. Figure 8: Top Tree Node 2) in order to evaluate the language programme impact on relationships in and beyond the Intermediate Phase classrooms of the four IDDP schools. This evaluation focus includes the relationships with the School Management Teams (SMTs), as well as the role and status of English in the schools and in the community.

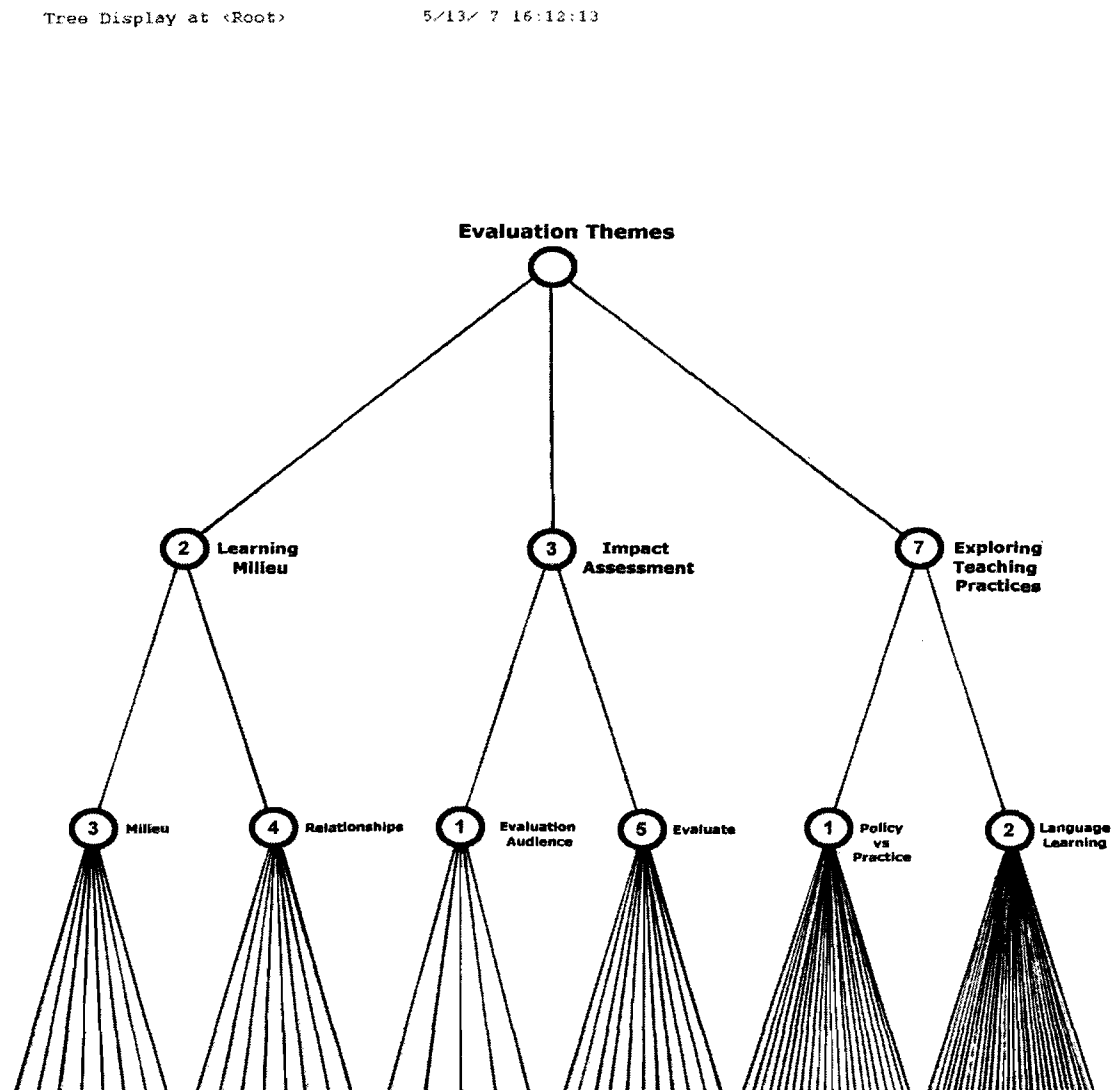
The emphasis on the learning milieu corresponds with the major focus on the learning milieu in illuminative evaluation. Parlett and Hamilton (1975:145) view the learning milieu as a main concept in illuminative evaluation and describe it as “a network or nexus of cultural, social, institutional, and psychological variables”.

The final clustering of the evaluation themes presented above (cf. Figure 8) emerged from a process of progressive focusing in data coding, classification and interpretation of the interview and questionnaire texts in the N6 database. The thematic framework for the descriptive evaluation of the English as LoLT Course was aligned with the two central concepts of illuminative evaluation, *instructional system* and *learning milieu* (Parlett & Hamilton, 1975:144).

A display of the thematic framework for the impact assessment of the English as LoLT Course is presented below in Figure 8.

An assessment of the course impact on OBE teaching practices, learner participation, assessment, and the use of English as the LoLT follows the display (cf. Section 1).

Figure 8: N6 Tree Node Display of the Impact Assessment Thematic Framework



10.4 Impact Assessment of the English as LoLT Course

10.4.1 The Impact of the Course on Planning in OBE Teaching Practices

The writer's analysis of the electronic and hard copy interview transcripts indicated a marked difference in the way the Intermediate Phase teachers and the two district officials understood planning in OBE. The course introduced a simpler planning format and provided models of lesson planning that illustrated a focused use of critical and specific learning outcomes.

The interviewees participated in the evaluation as stakeholders in the primary evaluation audience of the English as LoLT Course. They all commented on the effectiveness of the course to bridge the gap in planning between OBE policies and teaching practice.

The N6 text search indicated 32 references to *planning*. The word *planning* appeared in six of the seven online documents (cf. Appendix Q: Report 7).

However, an analysis of the hard copy interview transcriptions showed the moderator's reservation about teachers' ability to see the bigger picture in their overall and lesson planning. This concern also surfaced during the formulation of the questionnaires with the SHC R&D implementation team. One of the questions therefore asked respondents to rate the degree of change in their ability to fit their lesson plans into the bigger picture of learning programmes (cf. Appendix M: Question 1.2.2.a).

Data from 10 Intermediate Phase teachers' responses showed that their insight into linking learning programmes and specific lesson plans had changed to a large degree. The descriptive statistic indicated an average of 3.9 on a 4-point rating scale (cf. Appendix N: Spreadsheet 1). These findings correlate with the results of the quantitative, comparative analysis of the descriptive statistics of the IDDP curriculum baseline and impact survey (cf. Section 10.2). The analysis (cf. Table 8) indicated a practically significant difference of a large effect size (1.71).

The above results from a quantitative data analysis of the questionnaire and the IDDP curriculum impact survey consequently allayed the reservation and concern of the moderator and the SHC R&D implementation team.

The ten Intermediate Phase teacher respondents (cf. Chapter 9, Section 9.3.2.2) accorded an even larger degree of change to their planning skills for language activities to support content learning. Their questionnaire responses indicated that they had perceived a definite change at an average score of 4 out of 4 (cf. Appendix N: Spreadsheet 1). In addition, the descriptive statistics of the quantitative, comparative analysis of the IDDP curriculum baseline and impact survey (cf. Section 10.2) confirm a practically significant difference of a large effect size (1.15) in the twelve Intermediate Phase teachers' usage of English as the LoLT in their teaching practices (cf. Table 8).

The writer as evaluator and researcher's content analysis of interviewees' final examination lesson plans and presentations (cf. Appendix P) confirmed this result. Evidence of planning for language learning techniques was provided in the lesson plans of all eight interviewees. They all planned for the acquisition of English content vocabulary and for the use of the vocabulary in short, simple sentences.

The content analysis of interviewees' final examination lesson plans confirmed programme participants' positive perceptions of their improved language planning skills. The writer found that programme participants had planned for the inclusion of six language learning techniques in addition to using flash cards for English content vocabulary and to using the words in simple sentences. Two teachers included language games in their planning; two included mix-match activities; four included visual clues; two included the identification of key words; two included exercises to fill in the missing words and one teacher included the use of an exchange table in her planning. The impact of the wide variety of 45 language learning and teaching techniques offered in the English as LoLT Course (cf. Chapter 8, Section 8.2.2.3) was evident, even within the limited scope of one lesson plan.

Conclusion and Recommendations

The above discussions of qualitative and quantitative results from language programme participants' interviews, questionnaires, final examination lesson plans and observation schedules led to the following conclusion. The English as LoLT Course made a remarkable difference to programme participants' OBE planning skills. The course especially raised their level of knowledge, skills, and awareness to plan for the use of English as the LoLT.

10.4.2 The Impact of the Course on Planning and its Impact on the Learning Milieu

Evidence that programme participants' increased competencies in planning impacted significantly on their relations with their colleagues was found in the comprehensive database of the English as LoLT Course assessment phase. The writer's analysis of the hard copy interview transcripts indicated that the teachers, the district officials and the provincial official shared, and wanted to continue sharing, the course information on planning with their colleagues.

The English as LoLT Course impact on planning extended beyond the classrooms and district offices of the programme participants. The twelve Intermediate Phase teachers participated in the relevant learning area and phase professional working groups at the four IDDP schools. The IDDP Curriculum Impact Survey Report (Mostert *et al.*, 2004:13) indicated that teachers found that the "functioning of professional working groups was very effective and helped them to plan and organize their work effectively and efficiently".

The professional working groups provided a formalised network in teachers' learning milieu to further the development of their planning and organisation skills. The twelve Intermediate Phase teachers who participated in the English as LoLT Course strengthened this network by sharing and developing their planning skills through co-operative learning. The principle of co-operative learning was also modelled in the workshop and assessment activities of the English as LoLT Course (cf. Appendix U).

Conclusion and Recommendation

The remarkable difference that the English as LoLT Course made on the programme participants twelve also made a difference to their interaction with their peers.

The refinement of teachers' planning skills could be practised through co-operative learning in their school and cluster professional working groups. The two district officials could use their increased competencies in planning to continuously refine and develop simplified planning formats with the Intermediate Phase learning facilitators of all eight learning areas in order to provide appropriate support to the Intermediate Phase teachers.

The impact assessment of the English as LoLT Course on OBE and language planning practices highlighted the interrelatedness of the course content and the learning milieu. The continued use of the links described in the above evaluation could also increase and sustain the effective features of the language programme.

10.4.3 The Impact of the Course on Learner Participation in OBE Teaching Practices

Programme participants' responses during the small group interviews indicated that their perceptions of learner participation in a learning experience had changed. Teachers came to realise the usefulness of active engagement in a learning experience. This change was brought about through a variety of active engagements in learning experiences that were modelled in the workshop activities and assessment activities of the English as LoLT Course (cf. Appendix U). This language programme modelled individual learner participation and learning together in pairs, in groups and as a class. The interview with the English as LoLT Course moderator also highlighted the positive contribution of this language programme to active learner participation through role modelling.

Active learner participation in group work received focused attention in programme participants' interview responses. They responded to this focus in two ways. The teachers and district officials firstly looked at the way in which they themselves had benefited from active participation in the group activities of the course. They then responded to the practical application of active learner participation to the classroom context. One teacher provided the following explanation of how she and her learners actively participated in group work. "They must all participate, they must all be busy and I must be within the groups to see that they are really on board." A text search of the N6 database indicated a strong presence of the tree node *group work*. Interviewees referred 26 times to the term and it appeared in six of the seven online documents (Appendix Q, Report 10).

The text search allowed the writer to browse through the documents to review the way that interviewees had used the term *group work* in a line as the selected unit of analysis. A teacher and a district official indicated how the course had illustrated the importance of using mixed ability groups to increase the participation of all learners in a learning experience, including the slow learners.

An analysis of the Intermediate Phase teachers' questionnaire responses confirmed that the language programme had changed their understanding of learner participation in activity-based group work to a large degree (cf. Appendix N: Spreadsheet 1). The use of activity-based group work was rated at 3.5 out of 4 (cf. Appendix N: Spreadsheet 1). The English as LoLT Course impact on the use of learner centred group work was rated at 4 out of 4 on a 4-point rating scale (cf. Appendix N: Spreadsheet 1).

In addition, the descriptive statistics of the quantitative, comparative analysis of the IDDP curriculum baseline and impact survey (cf. Section 10.2) confirm a practically significant difference of a large effect size (0,81) in the twelve Intermediate Phase teachers' competencies to facilitate active learner experience (cf. Table 8).

Moreover, one district official commented that the English as LoLT Course did not only model active learner participation in group work, but also in individual and class work. The impact of the course in this respect became particularly evident in the writer as evaluator and as researcher's analysis of the eight interviewees' lesson plans and presentations for the practical part of their final examinations. A marked difference in the practical application of a variety of active engagements with language learning activities was evident in five out of the eight lesson plans and presentations. Opportunities for

learners to participate individually, in groups, and as a class in language games, mix-match activities, word recognition, and application in simple sentences, were apparent.

Conclusion and Recommendation

The above evaluation indicate that the English as LoLT Course made a distinct difference to the programme participants' competencies in facilitating active and varied learner participation in a learning experience. The emphasis in the English as LoLT Course on language learning developed the programme participants' competencies to facilitate active learner participation in varied language learning activities. These competencies promoted the effective use of English as the LoLT in all learning areas.

The programme participants and the provincial official suggested that the course could be extended to other districts in the Free State Province. The model for active learner participation developed in the English as LoLT Course needed to be shared with teachers on a larger scale.

The above exploration of learner participation illustrated the link between cause and effect (cf. Parlett & Hamilton, 1975:148) in the organisation of the English as LoLT Course. The course modelled the general OBE principle of active learner participation in learning experiences. The principle of learner-centred learning and teaching was then applied to the specific language learning focus of this language programme.

However, the modelling of active learner participation in learning experiences did not only feature in the activities of the English as LoLT Course as such; it also had an impact on the learning milieu of the four IDDP schools. An explanation of the nature and extent of this impact follows.

10.4.4 The Impact of the Course on Learner Participation and its Impact on the Learning Milieu

The writer's analysis of the hard copy interview transcripts revealed that programme participants' own experiences of active participation in group work had improved their confidence and motivation to share these experiences with their peers.

In addition, active learner participation in group work contributed to the development of mutual respect among the group members. A teacher interviewee's response explained the impact of the course on building respect among learners in a group as follows, "They have a leader and respect that leader - that is something that I've noticed - they respect

the leader and they respect each other". The descriptive statistics of the quantitative, comparative analysis of the IDDP curriculum baseline and impact survey (cf. Section 10.2) confirm a practically significant difference of a medium effect size (0, 72) in the twelve Intermediate Phase teachers' competencies to facilitate a positive atmosphere and relationships in their lessons (cf. Table 8).

This emphasis on mutual respect and on active engagement in learning modelled in the English as LoLT Course impacted positively on the role and status of Intermediate Phase teachers in the four IDDP schools. The school management teams of the four IDDP schools formally acknowledged the status and role of the professional working groups in their schools since the beginning of the second year in the project. The learning area and phase professional working groups provided opportunities for teachers to take responsibility for their own curriculum decisions and teaching practices. The professional working groups also provided formalised platforms for teachers to provide input in curriculum decisions within the learning milieus of the four respective schools. The functioning of the PWGs in the ten IDDP schools was a standing item on the IDDP progress monitoring and reporting template (cf. Appendix F, IDDP Quarterly Progress Report).

The impact of the English as LoLT Course and of the professional working groups combined to further develop teachers' professionalism. A comparative analysis of the IDDP curriculum baseline and impact survey results on teachers' professionalism showed a practically significant difference of a medium effect size (0, 69) (cf. Table 8). Comments of the moderator on the overall value of the course indicated an appreciation of the value of mutual respect and co-operative learning that could be used as a basic approach in future teacher development courses.

In addition, teachers who participated in the English as LoLT Course played an active role in facilitating the formulation of an English language pledge with staff members in the four IDDP schools during the first quarter of the third project year. The pledge required that all the teachers in the schools would be responsible for developing their learners' English BICS and CALP (Cummins, 1997:56) through whole school, class, and learning area routines.

A supportive informal and formal English language learning and teaching context was created. The following excerpt from a teacher's interview substantiates this conclusion.

Respondent 12 C: Yes. Concerning the plight we made together with the educators, it has also helped us a lot because it has brought to all of us the idea

that we are all language teachers, so we need to improve our language. With the use of that pledge, when we educate and during breaks, the communication is in English. They, our learners, are also free to use playground language because it is just informally [sic]. They are trying so ultimately they put on [sic] even SeSotho – so code switching is more used to assist our learners and to give them that freedom of participating in class.

The English as LoLT Course therefore created opportunities for the twelve Intermediate Phase teacher participants to engage actively in the formulation and implementation of the pledge. In addition, the above interview excerpt provides evidence of an increased awareness of the usefulness of English in everyday communication. Teachers' and learners' confidence to use English informally were promoted through the link between active learner participation in the English as LoLT Course and their learning milieu.

Conclusion and Recommendation

The above evaluation describes the links between the English as LoLT Course impact on learner participation and its impact on the learning milieu. This descriptive evaluation has led the writer to the following conclusion.

The opportunities created for programme participants to actively participate in the English as LoLT Course not only increased their knowledge and skills in the application of learner centred OBE, but also significantly developed their professional status in their learning milieus. This language programme provided guidelines to participants in actively promoting the role and status of English as a regular means of communication, as well as a language of learning and teaching in the learning milieus of the four IDDP schools.

The writer recommends the collaborative development and implementation of whole school, class, and learning area English routines as a practical way of creating a supportive English language learning context in schools. These guidelines could also inform the language-in-education policy of the school (cf. Chapter 11, Section 11.2.2).

10.4.5 The Impact of the Course on Assessment in OBE Teaching Practices

The interview transcripts of the Intermediate Phase teachers indicated that the English as LoLT Course made a difference to their understanding and implementation of continuous assessment strategies. Two interviewees described their initial lack of understanding and confidence in using continuous assessment during lessons. The English as LoLT Course demonstrated the application of various strategies in continuous assessment (cf. Chapter 8, Section 8.2.1.2). The teachers explained that they had learnt

how to apply self, peer and group assessment in their classrooms, through their own exposure to these assessment strategies during the course. An electronic text search revealed a high frequency in interviewees' reference to the tree node *assessment*. The term appeared 42 times in six of the seven online documents (cf. Appendix Q, Report 11).

A quantitative data analysis of the questionnaires showed that the Intermediate Phase teachers rated the course impact on their classroom application of self-assessment at an average of 3.3 on a 4-point rating scale (cf. Appendix N: Spreadsheet 1). The impact of the English as LoLT Course on the application of peer assessment in their lessons was rated at an average of 3.8 (cf. Appendix N: Spreadsheet 1). Programme participants rated the course impact on the application of group assessment to classroom practice at an average of 3.8 (cf. Appendix N: Spreadsheet 1). This quantitative analysis of the Intermediate Phase teachers' responses in the questionnaires supported the interview statements that the English as LoLT Course had changed their assessment practices for the better.

In addition, the descriptive statistics of the quantitative, comparative analysis of the IDDP curriculum baseline and impact survey (cf. Section 10.2) confirm a practically significant difference of a large effect size (0,79) in the twelve Intermediate Phase teachers' competencies to facilitate learner output and monitoring (cf. Table 8).

The interview transcripts of the two district officials emphasised the importance of considering the appropriate learner level and context in assessment activities that this language programme had demonstrated.

However, the moderator's interview transcript indicated that he felt that the English as LoLT Course had only "touched on assessment". The moderator explained this perception of the course impact by saying that although the course had contributed to teachers' understanding of assessment, there still seemed to be scope for further development. He indicated that teachers remained uncertain in their judgements about the level at which a learner demonstrated his competence in more open-ended OBE assessments such as portfolio assessments. He added that the open-ended nature of OBE could still be confusing to teachers because it did not have clear-cut right or wrong answers as in discrete-point assessments.

The provincial official's interview transcript confirmed the moderator's perception that teachers still needed more clarity about assessment. The official commented that one of

the ways in which teachers' uncertainty about their application of assessment could be seen was their need for standardised recording and reporting templates. The learning facilitators of the department had to provide these templates.

The writer's content analysis of the eight interviewees' final examination lesson plans and presentations presented more evidence of their continued lack of certainty in applying OBE assessment to their classroom practices. Only one out of eight lesson plans indicated assessment as a major component. The same lesson plan indicated the homework that the learners would receive. Another lesson plan provided descriptions of assessment activities during the lesson, but these descriptions formed part of the lesson activities and were not highlighted in the assessment section of the lesson plan. There were two references to peer assessment, two references to self-assessment and four references to teacher assessment in the eight lesson plans. There was no evidence of grids that would assist the teacher to assess and record the activities.

The writer then reviewed evidence from the English as LoLT Course content in the implementation assessment phase. The model lesson plan provided in this language programme emphasised the importance of assessment as one of its major components in Booklet 3 (SHC R&D Course Participation File, 2003:30-36). The model lesson plan provided examples of grids to assess learner competence in the activities. The plan also included a homework section in the assessment component. Programme participants themselves were exposed to numerous examples of assessment grids throughout the course. Examples of how these assessment grids were applied to their written answers in the portfolios were provided in the feedback that programme participants received on a regular basis.

The IDDP Curriculum Impact Survey Report (Mostert et al., 2004:13) on planning and organisation found that "the only problematic aspect commented on by the majority of the teachers was the recording and reporting of assessment measures".

Conclusion and Recommendations

The writer concluded that the English as LoLT Course made a difference to the twelve Intermediate Phase teachers' understanding and knowledge of continuous assessment practices, such as self, peer and group assessment (cf. Appendix N, Spreadsheet 1). However, this language programme did not contribute to the development of the programme participants' competencies to design their own assessment grids. These would measure learner performance in the learning outcome of the lesson. The

programme participants therefore remained uncertain about the recording and reporting of assessment procedures.

The programme participants still needed to further develop recording and reporting standards and templates co-operatively in their professional working groups, as well as on their own. In addition, they needed to ensure that the emphasis on assessment strategies and techniques initiated in the lesson planning template, remained a constant and conscious focus in their planning and implementation of OBE assessment practices. They also needed to standardise their interpretations of assessment standards co-operatively and in collaboration with the learning facilitator of the relevant learning area. The effective application of OBE assessment practices, especially in recording and reporting procedures, therefore still needed emphasis and practice.

10.4.6 The Impact of the Course on Assessment and its Impact on the Learning Milieu

The impact of the English as LoLT Course on assessment did not link explicitly with the education context of the four IDDP schools.

However, the following excerpt from a teacher's interview transcript demonstrates the teacher's skills to reflect logically on the impact of the course. The implicit link between assessment practices and reflective practice, especially in the Intermediate Phase teachers' professional working groups (PWGs), is illustrated in the analysis of the following excerpt. The teachers were asked in an open ended question to give their general views and opinions on the effectiveness of the English as LoLT Course. The excerpt also illustrates the interrelatedness of the instructional system and the learning milieu in illuminative evaluation (Parlett & Hamilton, 1975:147-150).

Respondent 6C: This course was really helpful for [sic] us, we have learnt so many things, and then it has helped us as educators to know that thorough preparation is something that every educator should do. And then the use of strategies, visual clues and code switching is very important. And then it has also helped us about [sic] the routines, especially in the Intermediate Phase as the starting point of English as LoLT. I think just to add generally how other schools can change for good, because here, the schools that were involved in this project, we have the opportunity of sharing with their educators – and the PWGs. And then they can come to our schools and observe, because really, we are not ashamed – our learners in this area are only getting English at school. But they are very competent, because we do debates here at school and they are participating very well.

The following summary of the teacher's response demonstrates the logic of her reasoning and highlights the interrelatedness of the various evaluation themes in the

impact assessment. The summary of the teacher's response confirms the interrelatedness of the evaluation themes presented in Figure 8 (cf. Section 2) through her descriptive evaluation of the English as LoLT Course impact.

The teacher indicated that the English as LoLT Course had shown her the value of thorough planning in order to apply OBE effectively in the classroom. This impact assessment relates to the evaluation theme *Policy versus Practice*. She then linked thorough preparation specifically to focused planning for the use of English as LoLT strategies, visual clues and code switching. The general *Policy versus Practice* theme was then linked to the specific evaluation theme *Language Learning* through planning. The teacher also linked the use of English with the role and status of English as the LoLT in their learning milieu. The evaluation theme *Language Learning* was linked with the theme *Learning Milieu*.

The teacher indicated the positive impact of the English language routines in the context of her own school. The teacher also appreciated the opportunities to share the English as LoLT strategies in the course with her colleagues of surrounding schools in the cluster professional working groups. She related the evaluation theme *Learning Milieu* to the theme *Relationships*. The teacher also invited teachers from the other schools to visit their school and observe the active learner participation and confidence of the teachers and learners in speaking English. The final section in the teacher's response demonstrates a culmination of the course impact through a combination of the following themes: *Learning Milieu*, *Relationships*, *Policy versus Practice* and *Language Learning*.

This qualitative interpretation of the excerpt from a teacher's interview transcript provided evidence that the English as LoLT Course developed this teacher's reflective practice skills, especially in logical sequencing. In addition, a quantitative analysis of the final examination data on the programme participants' essay marks confirmed the development of these skills. One of the four assessment criteria was that the participants had to demonstrate their ability to link the essay to the topic. Four of the eight interviewees scored above the average of 62.8% for their essays. Participants' essay marks constituted half of their second examination mark (cf. Appendix I).

Conclusion and Recommendations

The English as LoLT Course did not use the district support link created through the participation of the two district officials effectively to promote clarity in the assessment recording and reporting procedures of the Intermediate Phase teachers.

However, the English as LoLT Course had made a difference to the Intermediate Phase teachers' competency to assess and logically analyse questions. This competency could be applied to strengthen reflective practice in the professional learning milieu of the teachers in the four IDDP schools.

The interrelatedness of assessment and reflective practice in the learning system and in the learning milieu could be used to develop and standardise recording and reporting templates for each grade and learning area in the relevant professional working groups. The process of reaching consensus on the interpretation of an assessment standard could also contribute to clarifying the confusion about assessment that teachers may still experience. The recording and reporting templates could be developed in collaboration with the learning facilitator of a particular learning area in order to verify and further clarify teachers' interpretation of the assessment standards.

10.4.7 The Impact of the Course on the Use of English as the Language of Learning and Teaching

The main emphasis of the language programme was the development of the participants' use of English as the LoLT in their teaching practices. The previous descriptive evaluations of the language programme impact on OBE planning, learner participation, and assessment practices were constantly linked to the impact on language learning strategies and techniques.

The following evaluation explores programme participants' perceptions of the usefulness of these strategies and techniques to increase the effective use of English in their teaching practices.

Conceptual development and transfer in language acquisition were core features in the English as LoLT Course. The writer firstly analysed the hard copy interview transcripts to assess the course impact on teachers' understanding of conceptual development. The English as LoLT Course created opportunities to develop participants' understanding of the nature of their learners' language and literacy development through the fundamental distinction between contextualised and decontextualised language acquisition (Cummins, 1997:56). The moderator commented on the positive contribution of this language programme towards raising teacher's awareness of conceptual development in language learning.

The high frequency counts of the concepts tree node (20) (cf. Appendix Q, Report 8) and of the content tree node (20) (cf. Appendix Q, Report 9) in the text search indicated a strong presence of concept transfer in learning area content. The tree node content was also present in all seven online documents and the concept tree node was present in six of the seven online documents. This search also confirmed the moderator's perception.

The English as LoLT Course was structured to contribute to teachers' understanding of how learners' basic intercommunication skills (BICS) could be developed to effectively improve their cognitive academic language proficiency (CALP). The structure of this language programme promoted the progression (Cummins, 1997:59) from contextualised language activities in the learners' home language and in English to more context-reduced and cognitively demanding activities in English as the LoLT (cf. Appendices V; T). The moderator commented on the well-structured and systematic nature of the language programme in this respect.

The writer analysed programme participants' comments on language learning techniques for developing learners' basic interpersonal communication skills (BICS) in *their home languages*. They reported that they had found these techniques very useful. The language learning techniques illustrated how to introduce, repeat, and extend new concepts in their home language. The questionnaire responses of the eleven Intermediate Phase teachers who responded to this question (cf. Chapter 9, Section 9.3.2.2) rated the degree of usefulness of the course in this respect at 3.8 on the 4-point rating scale (cf. Appendix N: Spreadsheet 2).

Programme participants commented in their interviews on the positive contribution of the language programme in developing their understanding of how additional languages were learnt. It was evident that teachers could explain how language learning techniques used to develop learners' BICS in their home language could also be used for the development of learners' CALP in English. The positive impact of the English as LoLT Course was confirmed by the Intermediate Phase teachers' questionnaire responses. They rated the degree of usefulness at 3.7 on a 4-point rating scale (cf. Appendix N: Spreadsheet 2).

The writer analysed the content of the lesson plans and presentations for the final examination of the eight programme participants who participated in the small-group interviews (cf. Chapter 9, Section 9.3.3.2). The qualitative content analysis provided evidence of their knowledge in relation to BICS and CALP language learning techniques.

This knowledge was used to establish a meaningful concept transfer or relationship between at least SeSotho and English (cf. Chapter 8, Section 8.2.2.3).

In addition, the descriptive statistics of the quantitative, comparative analysis of the IDDP curriculum baseline and impact survey (cf. Section 10.2) confirm a practically significant difference of a large effect size (1,15) in the twelve Intermediate Phase teachers' competencies to use English as the LoLT in their teaching practices (cf. Table 8).

A content analysis of the final examination lesson presentations of the eight programme participants that were interviewed, found that six out of the eight programme participants provided sufficient contextual support to develop learners' English CALP during their lesson presentations. They introduced new English content vocabulary and phrases in different learning areas by using flash cards and visual clues such as pictures and objects to explain the new words or phrases. The teachers used code-switching, mix-match, and word recognition games. Learners also had to use the new English words in short, simple sentences. The availability and effective use of learning and teaching resources are discussed in more detail in the learning milieu evaluation focus (cf. Section 10.3.8).

However, the effectiveness of the contextual support depended to a large extent on the individual quality of teachers' input. Teachers themselves provided the most influential support to the development of learners' BICS and CALP in English in the rural milieu of the four schools in Phuthaditjhaba. The moderator suggested that teachers still needed further training in conceptual development. The writer's analysis of the lesson plans and presentations confirmed this perceived need of conscious focusing on the reinforcement of newly developed concepts. Only one of eight programme participants had planned to give her learners homework that would reinforce the newly acquired English words beyond the duration of the lesson.

It follows that the development of programme participants' own language usage was one of the main features of the English as LoLT Course. The purpose was to increase the quality of teacher support in the development of learners' BICS and CALP. The English as LoLT Course practically demonstrated communicative language teaching in the development of programme participants' own language usage. Teachers indicated in their small group interviews that they had gained confidence in facilitating language learning in the school, even if they were not language teachers. They had learnt that it was important to communicate in English, even if they made errors. The district officials

were quite aware of their own grammatical errors and indicated that the language programme had been useful in rectifying these. The Intermediate Phase teachers rated the usefulness of the course to develop their own English at 3.8 on a 4-point rating scale (cf. Appendix N: Spreadsheet 2).

The Intermediate Phase teachers never acknowledged their own language learning needs during the small-group interviews, but described the positive impact of the English as LoLT Course on the development of their learners' listening, reading, speaking, and writing skills. However, when asked what could be added to this language programme, three of the six interviewees indicated that the course needed to include more grammar exercises.

In addition, the moderator confirmed that the English as LoLT Course had exercised teachers' language skills and that it had built their confidence. However, he indicated that the programme participants still needed to refine their language usage, especially in writing. The moderator commented that the SHC R&D implementation team who assessed the participants' written output in the assessment activities had not identified all the grammatical errors. He suggested that stricter memos, or a language penalty, or a second mark for language usage should be considered to raise teachers' awareness of their language usage.

Reid (2005:126-129) comments that it may seem self-evident that students who make frequent grammar errors in their writing should study and practise grammar in order to improve their writing. Reid (2005:127) argues that remedial grammar study does not transfer to students' writing, especially in developmental workbook settings or in decontextualised drills. Reid (2005:128) suggests that students should "not only be helped to identify and correct their errors but also to prioritise them, based on the concept of error gravity". The identification of common errors in learner output could be considered as one way to remediate grammar errors effectively.

In addition, the moderator highlighted the effectiveness of the English as LoLT Course in using programme participants' written output to model the assessment of learners' portfolios. This language programme illustrated and practised continuous assessment, self-evaluation, and process writing. However, he commented that the transfer of these assessment skills to the teachers' own classroom practice remained a challenge. Teachers' interview responses indicated that they used their portfolio assignments as resources to share information with their colleagues in their professional working groups and to guide the application of the language learning strategies in their classrooms. Two

teachers indicated that they had experienced the value of positive feedback and had applied it to build their learners' confidence when they corrected their written or oral output.

The IDDP Curriculum Impact Survey Report (Mostert *et al.*, 2004:15) confirmed the impact of the English as LoLT Course on the Intermediate Phase teachers' own use of English. A comparison between the mean scores of the first survey and the second survey showed a practically significant difference. The descriptive statistics indicated that this aspect differed by a small effect size of 0.35 (cf. Table 8).

Conclusions and Recommendations

The English as LoLT Course made a remarkable difference to the Intermediate Phase teachers' competencies in using English as the LoLT in their teaching practices. It was evident that the programme participants had learnt how to develop and use learners' BICS in their home language as well as in English to effectively develop their CALP in English as the LoLT.

However, it was also apparent that the development of teachers' skills to strengthen and further clarify the newly developed English concepts in learners' BICS and CALP was still required. In addition, teachers needed to be shown how to conduct a careful analysis of the core concepts in the learning programmes. This analysis would lead to the design of language learning programmes for the effective development of their learners' English BICS and CALP in the multi-lingual and multi-cultural context of the four IDDP schools.

The English as LoLT Course developed programme participants' own language usage while modelling communicative language teaching. However, teachers had indicated the need to further develop their own English language usage. Teachers' grammatical consciousness still needed to be developed through, for example, the closer identification, correction and prioritisation of their grammatical errors. The crucial role of teachers as primary resources to provide a supportive context for the development of learners' BICS and CALP has moreover become evident from the above evaluation.

10.4.8 The Impact of the Course on the Use of English as the Language of Learning and Teaching and its Impact on the Learning Milieu

The use of Cummins' (1997:56) distinction between contextualised and decontextualised language acquisition in the course had a major impact on programme participants'

creation of supportive learning milieus on the playground and in the classroom. An analysis of the hard copy interview transcripts indicated that teachers realised the value of creating supportive contexts for language learning. Two teachers mentioned the usefulness of the English language pledge, as well as the whole school and classroom routines to create a supportive context for the development of learners' BICS in English.

The writer as researcher saw evidence of the English language pledge in the administrative blocks of all three schools visited for the small group interviews. Labels indicating the staff rooms, the offices and the classes were written in SeSotho and in English. General school rules and class rules were also written in SeSotho and in English. The DVD of the final examination lesson presentations showed learners singing a good morning song in English when they entered their classroom.

The writer analysed the examiners' comments on the supportive learning environment that existed in the four classrooms used by the teachers and district officials for their final examination lesson presentations. One out of four classrooms had a reading corner; one classroom had bilingual class rules, requests, and English dialogues on the walls; two classrooms displayed commercially produced English posters and two classrooms displayed English posters produced by the learners and teachers.

The fact that only one classroom had a reading corner was simultaneously indicative of the positive English as LoLT Course impact and of neglect. The presence of the reading corner in one classroom indicated that the teacher had realised the value of keeping additional reading resources to develop her learners' BICS and CALP in English. This realisation was also communicated in the teacher's interview transcript. On the other hand, the absence of reading corners in the other classrooms could result from a lack of security; a lack of funds to buy additional reading books, magazines, and newspapers; or a lack of interest from the school management and/or the teachers who taught in those classrooms. Teachers in the four IDDP schools mostly rotated among the classrooms. The upkeep of a reading corner would depend on a collective decision to establish the reading corner and on a collaborative effort to sustain it.

The availability of resources was mentioned as a major constraint in planning in the IDDP Curriculum Impact Survey Report (Mostert *et al.*, 2004:14). In addition, the moderator interview transcript indicated his concern about the effective use of resources should these be made available through collaboration between the schools, the parents, and the Free State Department of Education.

The writer found evidence from an analysis of teachers' hard copy interview transcripts that the English as LoLT Course had developed teachers' knowledge and skills to effectively use flash cards, dictionaries, newspapers, and magazines. Three teachers also indicated that they were using the course material and their completed portfolios as resources for learning and teaching. An analysis of the effective use of resources to support the development of learners' CALP in English during these lessons indicated that four of the eight teachers were able to use the resources effectively. This finding links with the moderators' concern. The finding also links with the recommendation of the IDDP Curriculum Impact Survey Report (Mostert *et al.*, 2004:16) that teachers need further practice in the effective and efficient use of learning and teaching resources, especially in the "integration of educational technology into the classroom experience".

In addition, teachers realised the valuable economic and social role of English for their learners and their communities. The following excerpt from the interview transcripts illustrates an increased awareness of the significant role of English in everyday communication in their learning milieu.

Respondent 3 B: Yes. ...They also understood that English is going to help them a lot when they [sic] are find jobs, or even go to other schools. And after the course they are so brave – they can just express themselves like this.

Respondent 14 B: Yes, even if here, when you have the situation that this place is a little bit rural, then education is bit by bit changing the views and opening the world of the traditionalists. They know that they cannot only communicate here, they can go to Durban and still communicate in the same language. Last term we went to Durban with them – they did not find it difficult to explain themselves perhaps if they want [sic] to buy something...

Conclusions and Recommendations

The English as LoLT Course has made a difference to the Intermediate Phase teachers' competencies in creating a supportive learning and teaching context for English. This language programme had an impact on the role and status of English beyond the classroom in its endeavour to provide a supportive climate for the development of learners and teachers' BICS and CALP in English. The school management team members, teachers and learners of the four IDDP schools all participated in the English language pledge and in the school and class room routines. The course raised their awareness of the value of English in everyday communication and as the LoLT.

However, the impact of the course on the accessibility and use of resource materials to improve learners' English language acquisition was only partly effective. According to Eggington (cited in Baldauf, 2005:230), language in education policy planning at the micro school level also includes a methods and materials policy. Although the English as

LoLT Course affected an increase in the provisioning of learning and teaching material and in the use of this material, there is still room for improvement in the involvement of the school management, parents, and the department.

The language in education policies of the four IDDP schools could offer a way of formalising and increasing governmental and community involvement. The parents needed to participate in formalising the language pledge into a school language policy. This process would involve the parents who are members of the school governing bodies (SGBs) of the four schools. The twelve Intermediate Phase teachers who participated in the English as LoLT Course could use their increased competencies in using English as the LoLT to make curriculum inputs in the language-in-education policies of the four IDDP schools.

10.4.9 A Summary of the Course Impact on the Programme Participants

A summary of the English as LoLT Course impact evaluation is presented in Table 9.

Table 9: Summary of the English as LoLT Course Impact on the Programme Participants

OBE Teaching Practices	→ Learning and Teaching Context	Language Learning and Teaching Practices	→ Learning and Teaching Context
English as LoLT Course Curriculum Impact on OBE Teaching Practices	English as LoLT Course Impact on the Learning Milieu of the Four IDDP Schools	English as LoLT Course Curriculum Impact on Language Learning and Teaching Practices	English as LoLT Course Impact on the Learning Milieu of the Four IDDP Schools
10.4.1 Planning	10.4.2 Planning	10.4.7 The Use of English as the LoLT	10.4.8 The use of English as the LoLT
<i>Marked difference:</i>	<i>Difference in interaction with peers.</i>	<i>Marked difference:</i>	Creation of a supportive language learning and teaching context for the development of learners and teachers' BICS and CALP in English.
Raised level of understanding, knowledge and skills to use a simplified planning template that includes an emphasis on the use of English as LoLT in all learning areas.	Increased confidence to share and develop their planning skills through co-operative learning in their Professional Working Groups (PWGs)	Usefulness of competencies learnt in how to develop and use learners' basic interpersonal communication skills (BICS) in their home language and in English to develop their cognitive academic language proficiency (CALP) in English as the LoLT.	Promotion of the role and status of English in everyday communication and as language of learning and teaching.
	→		→
10.4.3 Learner Participation	10.4.4 Learner Participation	10.4.7 (Continued)	10.4.8 (Continued)
<i>Marked difference:</i>	Developed professional status of 12 Intermediate Phase teachers.	<i>Marked difference:</i>	Development of whole school and classroom routines with the school management teams in collaboration with their
Facilitation of active and varied learner		Competencies developed in using language learning and	

OBE Teaching Practices	→ Learning and Teaching Context	Language Learning and Teaching Practices	→ Learning and Teaching Context
English as LoLT Course Curriculum Impact on OBE Teaching Practices	→ English as LoLT Course Impact on the Learning Milieu of the Four IDDP Schools	English as LoLT Course Curriculum Impact on Language Learning and Teaching Practices	→ English as LoLT Course Impact on the Learning Milieu of the Four IDDP Schools
participation through co-operative learning, especially in varied English language learning activities in all learning areas.	→ Emphasis on mutual respect and on active engagement in learning developed role and status of Intermediate Phase teachers in schools through co-operative learning in PWGs	teaching strategies and techniques to facilitate meaningful concept transfer between SeSotho and English.	→ staff. All teachers pledged to accept their responsibilities in using these opportunities to promote and use English informally and formally.
10.4.5 Assessment	10.4.6 Assessment	10.4.7 (Continued)	10.4.8 (Continued)
<i>Marked difference:</i>	Link between assessment and reflective practices emphasised the development of Intermediate Phase teachers' skills to logically analyse questions, especially in their PWGs	<i>Difference:</i>	Use language learning support material such as flash cards, dictionaries, news papers, magazines.
Understanding and knowledge of how to practice continuous assessment, especially in peer, group and self assessment	→	Own language usage in English developed, but still need improvement, especially in grammatical competence.	→ Reading corners were difficult to sustain. Use English as LoLT Course Files and completed participant portfolios as language learning and teaching resources.
<i>No difference:</i>		<i>Marked difference:</i>	
Remained uncertain about the development of recording and reporting templates and assessment grids	Link with district support (2 district officials who participated) not utilised effectively to obtain clarity in reporting and recording procedures for Intermediate Phase teachers	Usefulness of course to build participants' confidence to communicate in English.	

10.5 Meta-evaluation

The guidance provided by a language programme model to produce and present convincing evaluation evidence is essential for the validation of the impact assessment of the English as LoLT Course presented above (cf. Section 4). This section evaluates the ability of Lynch's (1996:4) CAM to validate a convincing impact assessment of the English as LoLT Course. Reflexive comments on the effectiveness of this language programme model and of the impact assessment phase in this case study conclude the meta-evaluation section.

10.5.1 Flexibility

The validity of Lynch's (1996:3) claim that his Context Adaptive Model is meant to be a flexible model that will "constantly reshape and redefine itself" is particularly relevant in

the application of this model to the impact assessment phase of the English as LoLT Course.

The impact assessment phase of this case study followed Lynch's (2003:134-147) guidelines on the analysis of interpretivist evaluation information (cf. Chapter 9, Section 9.3.1.2; Section 10.3). Lynch (2003:135-146) offers five steps for data analysis and interpretation. These are: focusing; organising the data; coding the data; classifying and reducing the data and interpreting the data. This interpretivist data analysis process followed in the impact assessment phase of the English as LoLT Course evaluation illustrated the process of progressive focusing in the illumination model (cf. Parlett and Hamilton, 1975:148).

Lynch (2003:135) highlights the importance of developing a thematic framework to focus the data. Lynch (2003:135-6) defines a theme as "an issue that has surfaced in the process of negotiating your entry to the setting and/or during the gathering of data". The progressive focusing of the evaluation themes in the final programme evaluation stage (cf. Figure 3, Stage 5) reduced the seven evaluation themes of the needs assessment and implementation phases (cf. Chapter 6, Section 6.3; Chapter 8, Section 8.1) to four (cf. Chapter 9, Section 9.3.1.2) and finally to three evaluation themes (cf. Section 10.3). The final, thematic framework for the interpretivist evaluation of the assessment phase consisted of the impact assessment, the teaching practice and the learning milieu theme. This thematic framework allowed for a participatory evaluation of the English as LoLT Course curriculum that impacted most on its participants and on the education context of the four IDDP schools. This framework explored, or illuminated the interaction within and between the two basic concepts of illuminative evaluation namely, the instructional system (curriculum) and the learning milieu (education context) (cf. Parlett & Hamilton, 1975:144-147).

In addition, the flexibility of Lynch's (1996) CAM enabled a redefinition of the existing themes. They were continuously redefined throughout the data organisation, coding, classification, reduction, and interpretation stages of the impact assessment. The essential meaning of the evaluation themes remained the same as they defined issues that were derived from an exploration of the education context in the four IDDP schools in Phuthaditjhaba. Their redefinition was linked to the way in which they interacted with one another in a constant dialogue with the particular evaluation requirements of the evaluation audiences and context of the impact assessment phase.

The purpose of this constant review of the evaluation framework was to provide a clear focus to detect and describe the change brought about by the English as LoLT Course. The flexibility of Lynch's (1996:4) CAM facilitated an interpretivist data analysis and interpretation process aligned to the purpose of the assessment phase. The evaluation consequently complied with the evaluation standard of feasibility (cf. Stufflebeam, 1999; 2001; Beretta, 1992:18). The evaluation also aligned with the illumination model (cf. Parlett & Hamilton, 1975) implemented in language programme evaluation (cf. Lynch, 2003:25).

The flexibility of Lynch's (1996:4) CAM did not only facilitate an interpretivist impact evaluation (cf. Figure 3, Stage 5) of the English as LoLT Course, but also a positivist evaluation. Lynch (2003:22-25) provided guidelines for a positivist evaluation design. The IDDP curriculum baseline survey followed these guidelines to quantitatively measure the change brought about by the English as LoLT Course. A programme group-only design was used to measure the language programme impact on the twelve Intermediate Phase teachers in the four IDDP schools. The singular nature of the case study (Stake, 2005:443) excluded the presence of a comparison group required in a typical positivist, quasi-experimental evaluation design (Lynch, 2003:22). The quasi-experimental design used for the collection and analysis of quantitative data in the IDDP curriculum impact survey illustrates the use of a *programme group with pre-test and post-test* design (Lynch, 2003:24).

The pre-test data for these twelve teachers were extracted from observation data on the twenty-six Intermediate Phase teachers of the four IDDP sample schools in the IDDP curriculum baseline survey, as previously indicated (cf. Chapter 7, Section 7.3.2.7). The twelve Intermediate Phase teachers also participated in the needs analysis (cf. Figure 3, Stage 1b) of the English as LoLT Course evaluation. The observation data recorded and reported for these twelve finalised participants are indicated in Table 5.

The post-test data were obtained from the second observation of these twelve Intermediate Phase teachers during the impact analysis (cf. Figure 3, Stage 5) of this language programme. The language programme effect was therefore quantitatively measured on a cohort of twelve Intermediate Phase teachers who participated in the programme over a period of eighteen months (Lynch, 2003:25).

The flexibility of Lynch's (1996) CAM therefore provided guidelines for the collection and analysis of quantitative and qualitative sets of data to form a comprehensive database for the impact assessment. The positivist, as well as the interpretivist evaluation design,

served the purpose of the assessment phase to detect or measure the impact of the English as LoLT Course. The flexibility of the language programme model validated the data collection and analysis procedures followed in the impact evaluation (cf. Figure 3, Stage 5) of the assessment phase in the English as LoLT Course case study.

The alignment of the interpretivist and positivist evaluation designs with the summative purpose of the impact assessment phase in the case study complied with the evaluation criterion of purposefulness and usefulness in interpretivism (Leedy & Ormrod, 2001:164) and with the criterion of utility in utilitarian pragmatism. The impact evaluation also responded to the evaluation standards of feasibility and utility (Stufflebeam, 1999; 2001; Beretta, 1992:18).

10.5.2 Appropriateness

Lynch (2003:137) recommended the NUD*IST computer software, which is more recently known as the N6 programme (QSR, 2002). The writer found the overall use of the N6 programme appropriate for the impact assessment of the English as LoLT Course. The writer used this computer software for electronic data filing, classification and interpretation in addition to a hard copy system (cf. Chapter 9, 9.3.1.2).

The major advantage of the electronic database was that it brought more rigour to the data analysis process. The writer had to carefully consider how to structure the relationships among the various evaluation themes. The challenge was to create assessments that were sufficiently focused on a specific identified need of the Intermediate Phase teachers in the needs analysis stage (cf. Figure 3, Stage 1b) of the course evaluation. These assessments would also have to accommodate the complex interrelations between the instructional system, the learning milieu and the multiple perspectives of the evaluation audience. The tree node display of the thematic evaluation framework (cf. Figure 8) illustrates the ability of the N6 to assist the researcher in structuring the data meaningfully.

However, the cross-platform ability of the N6 is limited. The results of the programme cannot easily be exported to any other programme. The diagrams that are displayed are also of poor quality and need a special graphics programme to be used effectively. In addition, the N6 restricts the unit of analysis to lines, sentences or paragraphs. This restriction impacted on the analysis of the interview transcripts and summary document of the course participant questionnaires in the database. The analysis of a line reference in isolation of its discourse content could seriously skew the interpretation of the key word or phrase.

The browse facility of the N6 assisted the writer to quickly recall instances when the key words were used. However, the writer recalled the context in which the words were used by glancing at the lines on the hard copy transcripts. The analyses of the electronic and hard copy interview transcripts complemented each other to produce a more precise and comprehensive interpretation of the interview data.

The writer also followed Lynch's (2003:95-98) guidelines on the analysis of non-test measurement data. Guidelines on the analysis of a 4-point Likert scale (Lynch, 2003:95-97) were used to analyse programme participants' questionnaire data presented on Excel Spreadsheets (cf. Appendix N). The writer related the data display on the spreadsheets to the interview transcripts by linking the codes allocated to the participants to the electronic databases. The same codes were used in the analysis of programme participants' final examination lesson plans and presentations.

However, the observation scheme (cf. Appendix P) designed by the SHC R&D implementation team to assess the programme participants' final examination lesson presentations (cf. Chapter 9, Section 9.3.3), did not comply with the guidelines on observation schemes provided by Lynch (1996:108-125; 2003:72-74).

As previously described (cf. Chapter 9, Section 9.3.2.2), this observation scheme was designed to capture quantitative and qualitative data on lesson planning, the language learning environment, the success of the lesson, and the use of language learning techniques. According to Mackey and Gass (2005:193), most schemes "have categories for the content or topic of the lesson, as well as the types of activities and materials used". The observation scheme used to observe the programme participants complied with these basic requirements of an observation scheme. It required the observer to write the topic of the lesson; to describe the language learning techniques used during the lesson and to indicate whether the participant had used resource materials to create a supportive context for language learning.

However, Mackey and Gass (2005:190) state that the observation procedures and coding schemes of the observation carefully need to consider the purpose of the observation. The summative goal of the final examination was to describe and measure the impact of the English as LoLT Course on the programme participants. The categories of the observation scheme did not consider the complete range of the Intermediate Phase teachers' lesson planning and presentation needs (cf. Table 3) that the English as LoLT Course responded to (cf. Table 8). The content validity (cf. Lynch,

2003:150; Mackey & Gass, 2005:107; Brown, 2002:177) of the observation scheme was therefore compromised.

In addition, the clarity and the purpose of the following statement under the heading *Lesson Plan* are not clear: *The learners used notebooks for this reason* (cf. Appendix P). The reason for using the notebooks was not specified. The observers could confuse the notebooks with class or home work books. They might also interpret the use of the notebooks differently. Were these notebooks supposed to be used to map the learners' own plans for the lesson, or to note new content vocabulary words?

The observation scheme furthermore does not indicate criteria for assessing a *successful lesson*. The observation scheme merely asks the observer to motivate why the lesson was successful. The category *successful lesson* is a high-inference category (Mackey & Gass, 2005:191). According to Mackey and Gass (2005:191) high-inference categories require judgements in relation to the function of an observed event. The reliability of a high-inference category increases if it is completed after, and not during, the event. The reliability of the observers' judgement call during the lesson is jeopardised as the observer needs to focus on the lesson and on the summative evaluation of the lesson. The placement of the category before the description of the language learning techniques requires the observer to complete this category during the lesson.

The reliability of the observation was further weakened through an absence of coding schemes that would allow the observer to record reliable observations of, for example, the teacher's questions and instructions and the learners' questions answers and interactions in a real-time coding situation (Mackey & Gass, 2005:191; Lynch, 2003:73). Instead, the observation scheme required the observers to describe the language learning techniques that the teacher used during the lesson. These descriptions were time-consuming and distracted the observers' focus from the activities and interactions that took place during the lesson. The examples of classroom observation tally sheets provided in Lynch (2003:73) and in Mackey and Gass (2005:192) provide examples of low-inference categories such as asking for clarification or explaining a grammatical point. These categories are clear and have an easy coding system that enables high levels of agreement or reliability. In addition, the observation scheme did not require the observers to note the starting and finishing time of the lesson presentation, nor to indicate regular time intervals.

The reliability and validity of the data that the writer obtained from the observation scheme (cf. Appendix P) were weak. However, the writer used this data as supplementary to the data obtained from the interviews (cf. Appendix K), the questionnaires (cf. Appendix M) and the observation schedules (cf. Appendix A) of the IDDP curriculum baseline survey. The quantitative and qualitative data in the comprehensive dataset strengthened the validity and the reliability of the conclusions reached about the impact of the English as LoLT Course.

The above discussion confirms the appropriateness of the data collection and analysis procedures provided in Lynch (cf. 1996; 2003). The SHC R&D implementation team did not follow the guidelines provided on observation schemes provided by Lynch (1996:108-125; 2003:72-74).

However, the application of Lynch's (cf. 1996; 2003) guidelines for language programme evaluation methodology facilitated the compilation of a comprehensive database for the impact assessment phase of the course. This rich dataset enabled an overall valid and reliable course impact evaluation (cf. Figure 3, Stage 5).

The profile of the course produced a coherent picture of its impact. The writer could use multiple data sources to draw consistent conclusions. The writer described the contradictions in the data. These contradictions were used to arrive at conclusions with recommendations in response to the concerns raised by some of the stakeholders in the evaluation audience.

The impact assessment of the English as LoLT Course consequently complied with the interpretivist criterion of completeness in interpretivism (Leedy & Ormrod, 2001:164) and with the evaluation standard of accuracy (cf. Stufflebeam, 1999; 2001; Beretta, 1992:18).

10.5.3 Clarity of Description

Lynch (2003:41-147) provided clear descriptions of qualitative and quantitative data collection and analysis procedures. The description of the five stages in interpretivist analysis (Lynch, 2003:134-147) and of the positivist programme group-only design (Lynch, 2003:24-25) were clear and useful to guide the impact evaluation stage (cf. Figure 3, Stage 5) in the assessment phase of this case study.

The description of the illumination model (Parlett & Hamilton, 1975:145-154) was further clarified by the descriptions of the model provided in Lynch (1996:83-84). Lynch's

(1996:84) application of the model was clarified still further through the description of a vignette that illustrated the illumination model as a “design for programme evaluation in applied linguistics”. The emphasis on the interaction among the English as LoLT Course curriculum, the learning milieu and the multiple evaluation audience in the impact assessment phase of the course presented a complete and multifaceted picture of its impact.

The clarity of description in Lynch’s (1996:4) CAM facilitated accurate data collection and analysis procedures that heightened the credibility of the impact evaluation conclusions. The course impact evaluation therefore complied with the evaluation criteria of rigour in interpretivism (Leedy & Ormrod, 2001:164) and with the evaluation standard of accuracy (cf. Stufflebeam, 1999; 2001; Beretta, 1992:18).

10.5.4 Clarity of Logic

The logic of the context adaptive model (Lynch, 1996; 2003) led to convincing impact assessments. The impact assessment could provide conclusions and recommendations that addressed the interests of the various primary evaluation audiences involved. The identification of the evaluation audiences as the first step of the context adaptive model (CAM) had consequently enabled a participatory evaluation.

The emphasis on the alignment of the data collection and analysis procedures to the research design of the impact assessment phase heightened the validity of the conclusions and recommendations. The purpose and research method of each data collection procedure in the impact assessment phase was described (cf. Chapter 9, Sections 9.2 and 9.3).

The iterative nature of the final data review process contributed to the internal logic of the impact assessment. The data were continuously revisited and new evaluation themes were created to ensure that the evaluation arguments would respond to the demands of the evaluation audience and the evaluation context. In addition, the finalised thematic framework enabled an assessment of the qualitative and quantitative data that explored the interrelatedness of the evaluation themes (cf. Section 10.4).

The emphasis on logic in the assessment of the English as LoLT Course ensured that the summative evaluation goal of quality assurance was addressed in the language programme evaluation. The rich data sources provided ample evidence of the English as LoLT Course impact on the development of the programme participants.

The above discussion indicates that the CAM (Lynch, 1996; 2003) facilitated a convincing impact assessment of the English as LoLT Course. This evaluation therefore complies with the evaluation criteria of purposefulness and persuasiveness in interpretivism (Leedy & Ormrod, 2001:164-165) and with the evaluation standards of feasibility and utility (Stufflebeam, 1999; 2001; Beretta, 1992:18).

10.5.5 Reflexive Comments

This section reflects on the effectiveness of Lynch's (1996:4) CAM to facilitate a core aspect in the language programme evaluation process, namely the identification of a valid evaluation design (Step 4 of the CAM) for the impact assessment phase (cf. Figure 3, Phase Three) of the English as LoLT Course. The writer discusses the flexibility and clarity of Lynch's (1996:4) CAM in providing effective guidance to the impact evaluation of this language programme.

At a methodological level, the guidelines on quantitative and qualitative data collection and analysis procedures in the illumination model provided in Lynch (1996:83-84) are clear. However, at the level of programme evaluation strategies and their underlying paradigms, the comments in Lynch (1996:83-84) are confusing. Lynch (1996:83) argues that, because the illumination model allows for the use of quantitative and qualitative data analysis, it "is, perhaps, better be thought of as a mixed strategy". Lynch (1996:171) adds to this confusion by classifying the illumination model as a naturalistic (interpretivist) model. He then adds that the model "is perhaps the most eclectic and broad in terms of the array of data that it pursues". According to Greene's (2000:984) categorisation of four major approaches to programme evaluation, eclectic methods are preferred methods of utilitarian pragmatism (cf. Table 1).

Lynch (1996:172) recommends the illumination model as a starting point for evaluators who are practising naturalistic (interpretivist) evaluation for the first time, because it is "well suited to a variety of contexts". Lynch (1992:61) designed the Reading English for Science and Technology (REST) project to do his own investigation of the positivist and interpretivist approaches as "the two major approaches to programme evaluation". Lynch (1992:94) reaches the following conclusion: "The approach that would seem to offer the most to programme evaluation, in any field, is a combination of quantitative and qualitative data." Lynch (1996:171) recommends mixed strategies, or mixed designs, as a preferred evaluation approach.

However, the seeming lack of flexibility in Lynch's (2003:3) two-category classification system of paradigms excludes the possibility of pragmatism as an alternative approach

to language programme evaluation. Creswell (2003:12), on the other hand, views the potential of pragmatism as follows: “for the mixed methods researcher, pragmatism opens the door to multiple methods, different worldviews, and different assumptions, as well as different forms of data collection and analysis in the mixed method study”.

The writer used the illumination model (Parlett & Hamilton, 1975:140-157) as a mixed evaluation research design for the impact assessment phase of the English as LoLT Course (cf. Figure 3; Phase Three). The writer experienced the tension between the underlying assumptions of the interpretivist and positivist paradigms in the collection, analysis and interpretation of the evaluation results.

According to Lynch (1996:171), there is still a tendency for sponsors to want *hard data* (quantitative evidence). The writer as evaluator, project manager and researcher experienced this tendency among sponsors, educators, researchers and as part of her own insistence on a measurable course impact on the twelve Intermediate Phase teachers. On the other hand, the SHC R&D curriculum developers, the curriculum departmental officials, teachers, researchers and the writer as evaluator and as researcher expected qualitative descriptions of the most salient course features and its interaction with the education context of the four IDDP schools.

The mixed evaluation design of the illumination model (Lynch, 1996:84) allowed the writer to choose what worked best at a particular time from both paradigms to compile a rich database that would strengthen the impact evaluation arguments (cf. Section 10.4.1). In addition, this eclectic approach of utilitarian pragmatism (Greene, 2000:984) allowed for sets of quantitative data to be *nested* (Creswell, 2003:16) within a larger data collection procedure. The conclusions reached in the impact evaluations of the English as LoLT Course were therefore validated from a utilitarian pragmatist and from an interpretivist evaluation approach. The impact measurement results from the quantitative data analysis of the IDDP curriculum survey were validated from both the positivist and from the utilitarian pragmatist approach.

Ultimately, the English as LoLT Course impact evaluation benefited from what Lynch (2003:28) refers to as the daunting task of mixing paradigms, by choosing a mixed evaluation design validated by the paradigm of utilitarian pragmatism (Greene, 2000:984) (cf. Table 1).

The guidelines provided in Lynch (cf. 1996; 2003) were consequently ineffective in providing an evaluation paradigm such as utilitarian pragmatism (cf. Table 1), that would

be flexible enough to enable the validation of evaluation conclusions reached from interpretivist and from positivist data analyses.

The following reflexive comment concerns the effectiveness of the impact assessment phase in the English as LoLT Course case study.

The impact assessment phase provided a comprehensive database of quantitative and qualitative data to present convincing evaluation arguments in the impact evaluation (Figure 3, Stage 5) of the English as LoLT Course. The conclusions reached from these evaluation arguments responded to the primary evaluation audience's summative evaluation goal of quality assurance.

The results of the impact evaluation presented quality-assured evidence to the Free State Department of Education and to the Flemish Government that the English as LoLT Course was an effective language intervention programme and that the funding had been wisely spent. The impact evaluation also provided information to all stakeholders in the primary evaluation audience (cf. Chapter 3, Section 3.2.1.7) about what worked and what could be improved in the course curriculum.

10.6 Conclusion

This chapter has provided a thematic framework for the descriptive evaluation of the impact assessment phase (cf. Section 10.2). The teaching practice theme evaluated the impact of the English as LoLT Course on OBE teaching practices in planning, the facilitation of active learner participation and assessment. The impact of this language programme on the development of teachers' understanding and application of language learning techniques in English as the LoLT received particular attention. In addition, the learning milieu theme assessed the course impact on the learning milieu (learning and teaching context) of the four IDDP schools.

The course impact evaluation results (cf. Section 10.4) confirmed that this language programme had made an impact on the development of its participants. The course made a major difference in the development of the twelve Intermediate Phase teachers' competencies in planning; active learner participation; the use of self, peer and group assessment in continuous assessment practice and in language learning and teaching practices, especially in the use of English as the LoLT. This course also had an impact on the development of these teachers' own language usage. However, the development and use of recording and reporting templates and assessment grids, as well as their grammatical competence still needed attention.

In addition, this language programme made a difference in developing a supportive context for the use of English as the LoLT. The confidence gained from the interactions between the twelve Intermediate Phase teachers, who participated in the course, with their peers in the four IDDP schools, afforded opportunities to increase these teachers' role and status in their school curriculum. Peer interactions in the Intermediate Phase Professional working Groups (PWGs) afforded teachers opportunities to develop their reflective practice and action research skills. The Intermediate Phase teachers' competencies in planning, which included focused planning for language learning activities in all learning areas, could also develop through co-operative learning in their PWGs.

The emphasis in the course on the development of a supportive context also involved the whole school staff. The school management team and the teachers in the four IDDP schools shared the responsibility of developing their own and their learners' competencies to use English as the LoLT, as well as in their everyday communication in the staffroom, during assemblies and on the playground.

The meta-evaluation section evaluated the ability of Lynch's (1996:4) CAM to validate a convincing impact assessment of the English as LoLT Course. The reflexive comments explored the effectiveness of this language programme model to validate the course from the paradigm of utilitarian pragmatism (cf. Table 1), which underlies this programme evaluation. Reflexive comments on the effectiveness of the impact assessment phase to fulfil the summative evaluation goals of the primary level stakeholders in the evaluation audience of this case study concluded the meta-evaluation section.

Chapter 11 presents a summary of the effectiveness of the English as LoLT Course. In addition, the next chapter offers recommendations to refine the English as LoLT Course curriculum. Chapter 11 also offers reflexive comments on the effectiveness of Lynch's (1996:4) CAM and on the core criteria used to discuss the effectiveness of this language programme evaluation model. The chapter concludes by indicating the relevance of this case study to the broader context of education and language development and research.

CHAPTER 11

CONCLUSION

11.1 Introduction

This chapter offers conclusions and recommendations on the effectiveness of the language programme and the language programme evaluation model in the English as LoLT Course case study. The chapter also presents an evaluation of the core criteria that were used to evaluate the effectiveness of Lynch's (1996:4) CAM. The conclusions reached in the evaluation and meta-evaluation of this study are then discussed in relation to the broader national and international context of language learning and teaching.

The final objective of the illuminative evaluation strategy is to place "individual findings within a broader explanatory context" (Parlett & Hamilton, 1975:148). The purpose of this chapter is aligned with the final objective of its overall illuminative evaluation strategy. The *broader explanatory context* of the English as LoLT Course case study refers to the education context of the four IDDP schools. The findings of the language programme evaluation can therefore not be generalised to all the Intermediate Phase teachers in the Free State province. However, the descriptive evaluations of this case study might be used to draw implications for other cases (Stake, 2005:460).

The purpose of this concluding chapter is to respond to the following evaluation research questions asked in the introductory chapter (cf. Chapter 1, Section 1.2):

- How effective was the English as LoLT Short Course?
- How effective was the language programme evaluation model selected for the evaluation of the English as LoLT Short Course?
- Which criteria were used to evaluate the language programme evaluation model?
- Which recommendations can be made for the evaluation of future LoLT courses?

The first section of this chapter responds to the first evaluation research question about the effectiveness of the English as LoLT Course. This section offers a description of the course impact on the development of the Intermediate Phase teachers' competencies in the four IDDP schools. The impact of this language programme on the learning and teaching milieu of the four IDDP schools is also described. In addition, this section offers recommendations for the refinement of the English as LoLT Course.

The second section responds to the second evaluation research question about the effectiveness of the language programme evaluation model used to guide this evaluation. This section presents findings on the effectiveness of Lynch's (1996:4) Context Adaptive Model for

language programme evaluation. In addition, this section proposes steps to consider in the selection of future language programme evaluation models.

The third section responds to the third evaluation research question about the core criteria used for the evaluation of the language programme evaluation model. This section offers reflexive comments on the usefulness and relevance of the core criteria identified for the evaluation of Lynch's (1996:4) CAM. This section also suggests core criteria for the selection of future language programme evaluation models. The findings and recommendations presented in the third and fourth sections of this chapter respond to the fourth evaluation research question about recommendations for the evaluation of future LoLT courses.

The fifth section briefly presents the contributions of the English as LoLT Course case study to language programme evaluation research before offering recommendations for further research. This study concludes by relating the findings and recommendations of the English as LoLT Course case study to the broader education and research contexts.

11.2 The Effectiveness of the English as LoLT Course

The impact evaluation (cf. Figure 3, Stage 5) of the English as LoLT Course confirmed that the English as LoLT Course was effective, but that it could still improve in certain areas. The paragraphs that follow present a descriptive summary of the English as LoLT Course impact on its programme participants. The description highlights features of this language programme that were useful in the growth of the Intermediate Phase teachers' competencies in the four IDDP schools.

11.2.1 Course Impact on the development of Teachers' Competencies

The English as LoLT Course had a major impact on the development of the programme participants' knowledge and skills in using a simplified planning template for their OBE work schedules and lesson plans (cf. Chapter 10, Section 10.4.1). Their knowledge and skills in integrating English language learning strategies and techniques in these lesson plans also improved remarkably. The twelve teachers' increased competencies in planning in turn increased their confidence to share and continuously develop their planning skills through co-operative learning in their Intermediate Phase Professional Working Groups (PWGs) (cf. Chapter 10, Section 10.4.2). The English as LoLT Course therefore had a positive impact on teachers' roles as curriculum developers.

The course also made a marked difference to programme participants' competencies in facilitating active and varied learning participation through co-operative learning,

especially in facilitating a variety of English language learning activities in all learning areas (cf. Chapter 10, Section 10.4.3).

The course emphasis on mutual respect and on active engagement in learning impacted positively on the development of the twelve Intermediate Phase teachers' professional status in the four IDDP schools. These twelve teachers shared an emphasis on co-operative learning in their Intermediate Phase Professional Working Groups. This emphasis also created opportunities for the development of their colleagues' participation in curriculum and in teacher-self development (cf. Chapter 10, Section 10.4.4).

In addition, the course made a major difference to programme participants' understanding and knowledge of how to practise continuous assessment, especially peer, group and self-assessment. However, the participants remained uncertain about the development of recording and reporting templates and assessment grids (cf. Chapter 10, Section 10.4.5).

The English as LoLT Course did not use the link with the two district officials to obtain support from the relevant district officials about the Intermediate Phase reporting and recording templates and procedures. However, the link between assessment and reflective practice emphasised the development of the twelve Intermediate Phase teachers' analytical skills. They participated in the assessment of their teaching experiences through reflective practice, especially when they shared their skills in OBE and in language learning and teaching practices with their peers in the PWGs (cf. Chapter 10, Section 10.4.6).

The programme participants' competencies showed a major improvement in developing and in using learners' basic interpersonal communication skills (BICS) in their home language and in English to develop their cognitive academic language proficiency (CALP) in English as the LoLT (cf. Chapter 10, Section 10.4.7).

In addition, the programme participants' competencies showed a remarkable improvement in their use of language learning strategies and techniques to facilitate concept transfer between SeSotho and English (cf. Chapter 10, Section 10.4.7).

The English as LoLT Course emphasis on positive feedback in learner output had a positive impact on programme participants' confidence to communicate in English. However, this language programme had a minor impact on the development of their own

English usage, especially on the development of their grammatical competence (cf. Chapter 10, Section 10.4.7).

As previously mentioned (cf. Chapter 10, Section 10.4.8), the use of Cummins' (1997:56) distinction between contextualised and decontextualised language acquisition in the course had a major impact on the programme participants' competencies to create a supportive language learning and teaching context. The development of learners and teachers' BICS and CALP in English promoted the role and status of English in everyday communication and as language of learning and teaching.

The course emphasis on the use of language learning resource material made a difference to the twelve Intermediate Phase teachers' knowledge and skills to use flash cards, dictionaries, newspapers and magazines in their teaching practices. However, the course only made a slight difference to the establishment and maintenance of reading corners in the Intermediate Phase classrooms (cf. Chapter 10, Section 10.4.8).

The twelve Intermediate Phase teachers also developed whole-school and classroom routines with the school management teams of the four IDDP schools and their staff to create more opportunities for using English formally and informally. All teachers pledged to accept their responsibilities in implementing these routines. In addition, the programme participants used their English as LoLT Course files and completed participant portfolios as language learning and teaching resources (cf. Chapter 10, Section 10.4.8).

The recommendations for the refinement of the English as LoLT Course presented in the next sub-section follow from the descriptive summary of the results in the course impact (cf. Chapter 10, Section 4). In addition, the recommendations consider the conclusions reached (cf. Chapter 8, Section 8.2) in the evaluation of the course curriculum response (cf. Figure 3, Stage 4) to the Intermediate Phase teachers identified needs (cf. Figure 3, Stage 1b).

11.2.2.1 Recommendations for Refinements to the English as LoLT Course

Although this language programme was effective, it can still be amended to become more effective. The recommendations offered in this section apply to the refinement of the English as LoLT Course curriculum in particular, but may also be considered in the development of future courses. Recommendations for the course to further develop Intermediate Phase teachers' competencies in OBE teaching practices are

presented first. Recommendations for this language programme to further develop teachers' competencies in the use of English as the LoLT follow. Recommendations for the course to further develop teachers' competencies in creating a supportive context for the use of English as the LoLT conclude this sub-section.

11.2.2.2 The Further Development of Teachers' Competencies in OBE teaching practices

Lesson Planning

The English as LoLT Course could increase its level of specificity in the examples of lesson planning templates in order to further improve the quality of the course.

Clarification of Outcomes, Values, Attitudes in OBE Planning

The course could use the opportunities created for teachers to reflect in the workshop activities of Booklet 3 (SHC R&D Programme participants File, 2003: 30-37) more meaningfully. They could develop a lesson planning checklist or guiding questions. These specific guidelines could be used to ensure and assure that their lesson plans complied with the essential features of OBE.

Effective Management of Varied and Active Learner Participation in Collaborative Learning

The course could offer simple theoretical explanations and more structured practical guidelines to develop teachers' basic understanding and knowledge of the links between group work, co-operative and collaborative learning (cf. Nunan, 2004:187-194; Ellis, 2004b:263-272; Scheepers, 2000; New Horizons for Learning, 2005). These additions to the course would further contribute to develop teachers' knowledge and skills in managing active and varied learner participation.

Assessment and Recording of Learner Performance During the Learning Experience

The course could include an example of an assessment grid with level descriptors in listening, reading, spoken interaction and production and writing (cf. Nunan, 2004:210). Teachers' skills to assess, for example, the levels of their learners' spoken interaction could result in a more focused integration of English language learning and teaching strategies in the content-based lesson. The assessment records of learners' spoken interaction in content learning areas could also be shared with the learners' English language teacher. This teacher could devote more time and attention to the development of learners' spoken interaction in content learning areas.

Overall Planning and Organisation of OBE Learning Experiences

The course could further develop a basic “resource pack” with and for the teachers. The additional resources could explain OBE principles, policies and second language teaching principles that were applied in the practical examples offered in the course.

Strategies to Increase the Quality and Quantity of Learner Output

The course could develop a list of strategies and techniques with the teachers to increase the quality and quantity of learner output. This list could be developed collaboratively with the teachers and their learning facilitator. The list could be linked to practical examples of learner output that are relevant to the context. In addition, the list could include examples of homework activities to reinforce learner output during the lesson.

11.2.2.3 The Further Development of Teachers’ Competencies in the Use of English as the LoLT

The Development of Effective Strategies in Concept Formation

The course could provide explicit summaries of the relevant second language learning and teaching principles, strategies and techniques that were illustrated in the practical examples.

It could develop a basic checklist to identify and develop their own and their learners’ language learning styles. This checklist could be informed by a Strategy Inventory for Language Learning (SILL) developed by Oxford (1989). This inventory incorporates her classification of six types of direct and indirect language learning strategies (cf. Oxford, 2002).

The Development of Effective Strategies in Concept Transfer from the Home Language to the LoLT

The English as LoLT Course could highlight the appropriate use of code-switching as an important communicative resource in learning and teaching. An analysis of English-Zulu code-switching by Adendorff (1996:402) emphasises its value as a communicative resource. The curriculum could, for example, further guide teachers in how to use code-switching in the multilingual context of their classrooms. Adendorff (1996:403-405) suggests that teacher trainees’ understanding of code-switching could be effectively developed by turning them into ethnographers. An

action research task in the course could, for example, guide teachers to explore the effective use of code-switching in the four IDDP schools.

The Development of English Teachers' Skills in Communicative Language Teaching

The course content could provide an explanation of the basic CLT principles. It could explicitly draw programme participants' attention to how these principles were applied in the methodology of the course curriculum.

The Development of Teachers' Language Usage in the LoLT

The course could focus more explicitly on grammar in teachers' assessment tasks in order to develop their own usage of English as the LoLT. Ellis (2004b:257) provides examples of implicit and explicit techniques for focusing on form during a task. Implicit techniques are requests for clarification and recasting of participants' utterances. Explicit techniques are explicit corrections, metalingual comments or questions, queries and advice about the use of specific linguistic forms. In addition, Ellis (2005:258-262) suggests that the following techniques could be used to encourage focusing on forms in the post-task phase, especially those that were problematic to learners: review of learner errors, consciousness-raising tasks, production practice activities and noticing activities.

11.2.2.4 The Further Development of Teachers' Competencies in Creating a Supportive Context for the Use of English as the LoLT

Teacher and Learner Motivation and Attitude toward Learning and Teaching

The course curriculum could create more opportunities for teachers and officials to express and increase their own motivation in English language learning and teaching. The course content could promote individual and group interaction activities that encourage reflections on the usefulness and appropriateness of learning and teaching in English as the LoLT. These reflections could include discussions on how to increase the confidence of programme participants and their learners in using English as the LoLT. Collaborative learning, positive feedback, scaffolding and the application of motivation in task-based learning and teaching could, for example, be discussed as strategies to increase learner confidence and motivation.

Management Support to Language Learning and Teaching

The curriculum could include tasks for developing the report writing skills of the teachers and the district officials. Progress reports on the English as LoLT Course to

School Management Teams of the four IDDP schools and to the relevant district officials could increase opportunities for the development of effective management support to the use of English as the LoLT in the schools.

The course could also develop the Intermediate Phase teachers' skills to formally negotiate increased opportunities for their own professional development. The English as LoLT Course curriculum could include tasks that would increase teachers' communication and negotiation skills in formal contexts.

The role and Status of English in the Four IDDP Schools

The English as LoLT Course curriculum could provide some practical guidelines for the language-in-education planning at the micro-level of the four IDDP schools. The language programme could contribute toward the articulation of the following policies (Baldauf, 2005:961): access policy, personnel policy, curriculum policy, methods and materials policy, resourcing policy and evaluation policy.

The Role and Status of the Intermediate Phase Teachers in Curriculum Decisions

The course content could explicitly link the value of its collaborative action research in the workshops and assessment activities (cf. Appendix T) to the Intermediate Phase professional working groups (PWGs) in the four IDDP schools. An explicit link of collaborative action research initiatives to the Intermediate Phase PWGs could increase the role and status of the teachers in language-in-education and corpus planning products at a micro-level (cf. Baldauf, 2005:959; Liddicoat, 2005:1006). In turn, the collaborative action initiatives could benefit from structured teacher participation in PWGs in the context of the four IDDP schools.

Adendorff (1996:402) confirms the status of teachers in the formulation of a school language policy. According to Adendorff (1996:402), teachers "need to understand that they are the ones, ultimately, who formulate and monitor school (including playground) language policy and their decisions must be rational and informed by sociolinguistic understanding of languages and their statuses in the school and in the community". As previously recommended (cf. Section 8.2.8.2), an action research task on the use of code-switching could benefit teachers in their classrooms. This task could also inform the guidelines on the use of code-switching in the language policies of the four IDDP schools

The Role and Status of English in the Pthuthaditshaba Community

The curriculum could create more opportunities for teachers and officials to promote the image of English in everyday communication in the Phuthaditjhaba community. The English language learning tasks could, for example, include tasks that would benefit the community, such as the formulation of guidelines on how to set up and market a small business. The learners and teachers could share these guidelines with community members at a meeting of the community development forum. These meetings usually take place at the schools or at the education resource centres.

The following section offers a summative evaluation of the effectiveness of Lynch's (1996:4) CAM as the language programme evaluation model that had to guide the language programme evaluation process in validating the above language programme evaluation (cf. Section 11.2.1).

11.3 The Effectiveness of the Context Adaptive Model

Alderson and Beretta (1992:299) offer the following guidance for the evaluation of second language education programmes: "evaluation needs to be reflexive. It needs not only to illuminate the nature of programme design, development and implementation: it also and importantly needs to offer insights into the nature of the evaluation process itself". They conclude their guidelines by inviting evaluators to contribute to the significant role of meta-evaluation in language programme evaluation: "If evaluators can evaluate evaluations, they can help improve the evaluation process, and thus contribute to the usefulness and relevance of evaluations" (Alderson & Beretta, 1992:299).

11.3.1 Purpose

The purpose of meta-evaluation in this study is to evaluate the effectiveness of Lynch's (1996:4) CAM in facilitating a valid evaluation of the English as LoLT Course (cf. Chapter 2, Section 2.2.2). The evaluation follows a utilisation-focused approach in line with utilitarian pragmatism (Greene, 2000:984) (cf. Table 1) and with the evaluation standard of utility (Stufflebeam, 2001). This approach is aligned with the interpretivist evaluation criterion of usefulness (Leedy & Ormrod, 2001:165). The above quotation from Alderson and Beretta (1992:299) emphasises the criteria of usefulness and relevance in language programme evaluations (cf. Section 11.3). The following summative evaluation of Lynch's (1996:4) CAM evaluates the usefulness and relevance (appropriateness) of the model by reflecting on what worked and what needs to be improved.

11.3.2 Evaluation of the Effectiveness of the Selected Language Programme Model

The evaluation considers the initial motivation for the selection of this language programme evaluation. It follows the seven steps of Lynch's (1996:4) CAM (cf. Chapter 2, Section 2.4.4). In doing so, it considers the evaluations and reflexive comments offered throughout the evaluation of this case study to reach conclusions about the usefulness and relevance of the model. The conclusions drawn from this meta-evaluation enable the writer to offer suggestions for the selection of future language programme evaluation models.

Step 1: The identification of the evaluation audiences

The first step in Lynch's (1996:4) CAM guides evaluators in the identification of their evaluation audiences. The writer as evaluator selected the CAM because this model highlighted the significance of the evaluation context from the onset. The identification of the evaluation audience depended on the proximity of the stakeholders to the evaluation context (cf. Chapter 3, Section 2.4.4.1). In addition, the selection of multiple evaluation audiences would enable a process of participatory evaluation in the English as LoLT Course evaluation. The evaluation interests and goals of each stakeholder in the primary evaluation audience were considered.

The application of the first step in Lynch's (1996:4) CAM was useful because it facilitated the definition of each stakeholder's participation in the evaluation of the English as LoLT Course. These were identified to specify the nature of the stakeholders' involvement in the evaluation.

The stakeholders included evaluation experts in the field of applied linguistics that would be involved in all the assessment phases of this case study (cf. Figure 3, Phases One to Three; Chapter 3, Section 3.2.1.1). This inclusion minimised Alderson and Beretta's (cf. 1992) concern about the involvement of an outsider evaluation expert who could be distrusted by the programme participants. The long term engagement of outsider evaluation experts in this case study would also minimise the positivist validity threats of the *observer's paradox* and the Hawthorne effect (Mackey & Gass, 2005:176) (cf. Chapter 6, Section 6.2.6.2). The engagement of language programme evaluation specialists further addressed Lynch's (2003:19) requirement for technical expertise to increase the reliability of the evaluation, especially in the analysis of multiple quantitative and qualitative datasets gathered in a mixed evaluation design.

However, the usefulness of the multiple stakeholder involvement in the English as LoLT Course depended on the degree to which the evaluators co-ordinated and standardised the various evaluations. The evaluators in the IDDP curriculum surveys controlled, for example, the reliability of the data collection and analysis procedures in the IDDP curriculum surveys (cf. Chapter 6, Section 6.4.2; Chapter 9, Section 9.3.4.2). This standardisation increased the reliability of the data whereas the lack thereof in the design of the observation scheme for the final examination lesson presentation (cf. Appendix P) weakened the validity and reliability of the data collection (cf. Chapter 10, Section 10.4.2). The effectiveness of the guidance provided by a language programme evaluation model does not necessarily guarantee the validity and reliability of the data collection procedures.

Nevertheless, the guidance provided by the CAM (cf. Lynch, 1996; 2003) facilitated the alignment of the English as LoLT Course evaluation process with the formative and summative goals of quality assurance, curriculum and teacher self-development of the stakeholders in its primary evaluation audience. The model was effective in this regard. The English as LoLT Course evaluation could therefore comply with the interpretivist criterion of purposefulness (Leedy & Ormrod, 2001:164) and with the education standard of feasibility (Stufflebeam, 1999; Beretta 1992:18).

Steps 2 and 3: The Clarification Phase

The second and third steps of the CAM (cf. Lynch, 1996; 2003) guide evaluators in the clarification of their evaluation contexts (cf. Chapter 2, Sections 2.4.4.2-3). The writer as evaluator chose Lynch's (1996:4) CAM because this model facilitated a process of progressive focusing in the clarification of the evaluation context through the compilation of a context inventory (Step 2) and the formulation of evaluation themes (Step 3).

This process was in line with the illuminative evaluation research strategy (cf. Chapter 1, Section 1.4) adopted as the overall strategy for the method of research in the English as LoLT Course evaluation. The process was also in line with an exploration of the multiple dimensions in the education and evaluation context of the four IDDP schools (cf. Figure 5) in this case study.

The application of the clarification phase to the evaluation context of the English as LoLT Course case study was useful in identifying features of the setting that would contribute to the selection of an evaluation design. The examples of preliminary evaluation themes (cf. Table 2) in Lynch (2003:19-20) proved to be very useful in providing structure to the

multiple data sets collected and analysed in all three assessment phases of the English as LoLT Course evaluation (cf. Tables 3,9).

In addition, the examples of preliminary themes promoted an interaction between issues related to the language learning and teaching curriculum and its context. The application of the third step in Lynch's (1996:4) CAM facilitated an evaluation of the interaction between the Intermediate Phase teachers' curriculum needs and the learning and teaching context in the four IDDP primary schools in the English as LoLT Course. This evaluation is in line with the emphasis on the interaction between the instructional system and the learning milieu in illuminative evaluation (Parlett & Hamilton, 1975:144-5).

However, Lynch's (1996:4) CAM does not provide guidelines on the formal articulation of the stakeholder involvement (cf. Chapter 3, Section 3.3.5) in the evaluation context. Nunan (1993:198), Stufflebeam (1999) and Alderson and Beretta (1992:20) emphasise the need for a formal agreement on stakeholder involvement during the negotiation phase of an evaluation. Nunan (1993:198) provides a comprehensive set of principles of procedure to guide the evaluator and the stakeholders on their rights and responsibilities in the evaluation. The fifth task in Stufflebeam's (2001) list of meta-evaluation tasks requires that a memo of understanding be issued or that a formal evaluation contract be negotiated. This contract should include the outcome of pre-evaluation negotiations about the funding, timeframes, and stakeholder involvement in the evaluation (Alderson & Beretta, 1992:58-9). The clarification phase in Lynch's (1996:4) CAM did not facilitate the compliance of the English as LoLT Course with the evaluation standard of propriety (Stufflebeam, 1999). The model was ineffective in this respect.

In addition, Lynch's (1996:4) CAM does not promote the importance of a pre-evaluation stage to verify the evaluability of the language programme evaluation. The application of two evaluability assessments in the implementation phase of this case study increased the level of appropriateness or relevance of the language programme (cf. Chapter 7, Sections 7.3.1-2). The unexpected outcome of the second evaluability assessment led to the adjustment of the scope and level of the English as LoLT Course. The usefulness and relevance of this language programme increased. As previously mentioned (cf. Chapter 8, Section 8.3.5), De Vos (2002:376) includes evaluability assessments or pre-evaluations as the second phase in her Integrated Model of Programme Evaluation (IMPE). The writer found Lynch's (1996:4) CAM lacking in this regard.

Step 4: The selection of a data collection design

The fourth step guides evaluators in the selection of a data collection design. The writer as evaluator of the English as LoLT Course chose Lynch's (1996:4) CAM because of its claim to be flexible and adaptable (Lynch, 1996:3). However, this apparent flexibility does not seem to apply to Lynch's (2003:20-22) guidelines for the selection of an evaluation approach or paradigm to validate a research design. The reflexive comments in Chapter 5 (cf. Section 5.5), Chapter 8 (Section 8.3.5) and in Chapter 10 explore this matter. In addition, comments on the flexibility of the model in Chapter 8 (cf. Section 8.3.1) illustrate the case in point.

The gist of the matter is that Lynch's (2003:20) two-category system offered the writer a choice between interpretivism and positivism with no middle ground option of pragmatism as an alternative paradigm of choices. The pragmatic stance of the evaluators led to the selection of utilitarian pragmatism (cf. Table 1) as the underlying research paradigm in the English as LoLT Course evaluation. This paradigm validated Creswell's (2003:16) Mixed Method Design as the overall research design of the case study (cf. Figure 3). Utilitarian pragmatism also validated the mixed evaluation designs in the three assessment phases (cf. Chapter 5, Sections 5.4.1-3; Chapter 6, Section 6.2.2; Chapter 7, Section 7.2.2; Chapter 9, Section 9.2.2).

Lynch (2003:20) promotes an evaluator's allegiance to either a positivistic or to an interpretivist paradigm (cf. Chapter 5, section 5.5.5). According to Lynch (2003:27), all attempts to combine the positivist and interpretivist paradigms "run the risk of compromising one paradigm or the other".

The reflexive comment of the meta-evaluation section in Chapter 10 (cf. Section 10.4.5) explores the complexity of combining the interpretivist and positivist paradigms in the mixed evaluation design of the illumination model. However, the guidance on the selection of paradigms provided in Lynch (cf. 1996; 2003), the complexities of the paradigm dialogue taken into account, could not facilitate the validation of the mixed evaluation research designs in the English as LoLT Course case study. The model was ineffective in this respect.

Steps 5 and 6: Data Collection and Analysis Procedures

The fifth and sixth steps of Lynch's (1996:4) CAM guide the data collection and analysis procedures. The writer as evaluator chose this language programme evaluation model because it offered detailed descriptions of both positivist and interpretivist approaches, data collection designs, procedures, and analyses.

The application of Lynch's guidelines facilitated the validation of the mixed evaluation designs in this case study at a methodological level. The accurate descriptions of the positivist and interpretivist data collection procedures in Lynch's (1996:4) CAM promoted the internal reliability and validity of the data collection and analysis procedures in all three assessment phases. In turn, the usefulness and relevance of the data heightened the evaluations' potential to reach informed conclusions.

The model was effective in facilitating the validity of the various mixes of qualitative and quantitative data collection and analysis procedures in the three assessment phases of this case study. The English as LoLT Course evaluation could therefore comply with utilitarian pragmatism, with the interpretivist criterion of usefulness (Leedy & Ormrod, 2001:165) and with the education standards of utility and accuracy (Stufflebeam, 1999; Beretta 1992:18).

Step 7: Evaluation Report

The final step in Lynch's (1996:4) CAM provides guidance on the writing of evaluation reports. The writer did not choose this model for its envisaged guidance in the writing of evaluation reports. Lynch (1996:9) offers limited guidance on the content and format of an evaluation report other than stating that the report "may differ in form and content to address the vested interests of the primary level multiple audiences". Mackey and Gass (cf. 2005:297-320) and Creswell (cf. 2003:49-70) offer specific guidance and checklists for report writing.

However, Lynch (1996:9) does emphasise the importance of selective communication of the results to the various audiences in the evaluation context. The distinction between a primary, secondary and tertiary level of evaluation in the first step of Lynch's (1996:4) CAM facilitated the communication of the evaluation results. The district officials as well as the Intermediate Phase teachers who did not participate directly in the English as LoLT Course benefited from the course evaluation.

The writer as project manager and researcher communicated the final reports on the English as LoLT Course impact to the Free State Department of Education and to the Flemish Government in the final IDDP Report. This report included a financial report on the efficient use of human, material and funding sources in the English as LoLT Course. In addition, the writer shared the course impact with the district officials and with all the Intermediate Phase teachers in the IDDP schools in a PowerPoint presentation during the project closing ceremony in November 2004.

11.3.3 Conclusion

The above evaluation reflected on the effectiveness of Lynch's (1996:4) CAM in facilitating a valid evaluation of the English as LoLT Course. This evaluation examined the effectiveness of the model according to the seven steps in the language programme evaluation process. As previously mentioned (cf. Chapter 2.4), Alderson and Beretta (1992:20) describe three basic stages followed in the programme evaluation process. The first stage involves negotiation between the evaluator and all stakeholders; the second stage describes data collection and offers an analysis of the evaluation; the third stage involves another round of negotiations in reporting back to the stakeholders. Similarly, the process elements in Stufflebeam's (2001) list of 11 meta-evaluation tasks progress from group process tasks, to technical tasks and then return to group process tasks (cf. Chapter 2, Section 2.2.2).

The conclusions about the effectiveness of Lynch's (1996:4) CAM to facilitate valid English as LoLT Course evaluations are presented according to the three stages in the language programme evaluation process described in the previous paragraph.

The guidelines in Lynch's (1996:4) CAM during the first negotiation phase were effective in identifying multiple evaluation audiences according to their level of involvement in the evaluation context. The identification of the goals and interests of the primary level evaluation audience facilitated an alignment of evaluation purpose and method. This alignment increased the validity of the evaluation. In addition, the identification of evaluation themes articulated the focus of the evaluation.

However, the model did not facilitate pre-evaluations. In addition, the model did not effectively facilitate the formal articulation of the stakeholder involvement in the evaluation during its clarification phase. A formal agreement would include negotiated consensus on the human, time and financial resources required for the evaluation.

The guidelines provided in Lynch's (1996:4) CAM during the technical evaluation phase were effective in facilitating a valid evaluation of the English as LoLT Course at a methodological level, but not at a paradigmatic level.

The guidelines provided by Lynch's (1996:4) CAM in the second negotiation phase were very cursory, and therefore not very effective. Guidelines in this phase would include examples of reporting formats. These examples would include a section on how to communicate the limitations of the study and suggestions on how to assist the

stakeholders in interpreting and applying the findings (cf. Mackey & Gass, 2005:297-320; Creswell, 2003:49-70).

11.3.4 Suggestions for the Selection of Future Language Programme Evaluation Models

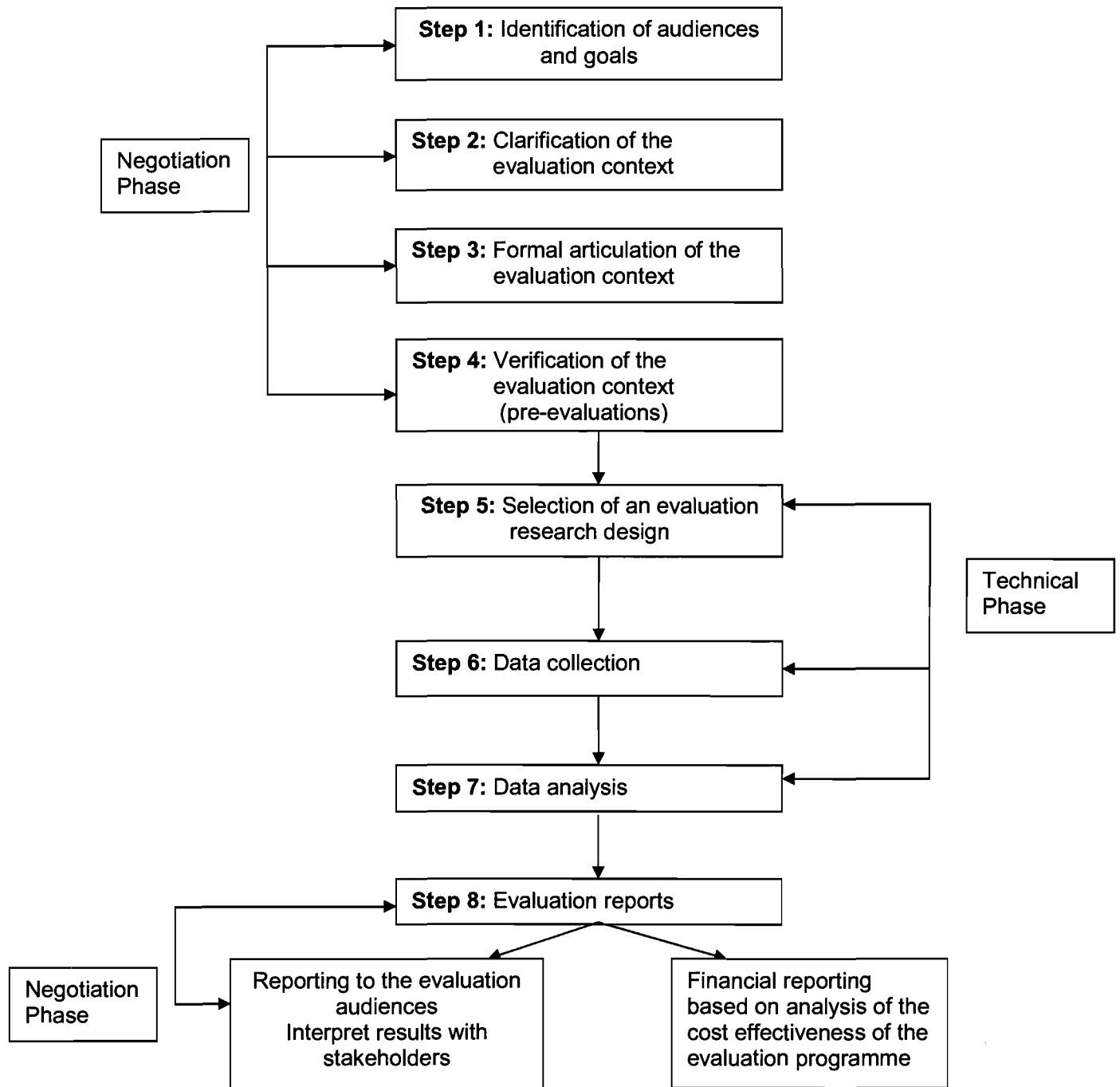
The writer offers the following suggestions for the selection of future language programme evaluation models. These suggestions are based on the summative evaluation of Lynch's (1996:4) CAM presented in this section, as well as on its formative evaluations in the meta-evaluation sections of this study.

The identification of evaluation stakeholders according to their level of involvement in the evaluation context could be considered as essential for the validation of the language programme evaluation and for the promotion of participatory evaluation. The formal articulation of the identified stakeholder involvement in the evaluation could be regarded as a prerequisite for an effective and efficient language programme evaluation process. The identification of evaluation themes could focus and provide structure to the evaluation. In addition, the negotiation phase should include an emphasis on pre-evaluations during a verification phase. The two evaluability assessments in the English as LoLT Course evaluation increased the internal validity of the language programme evaluation.

The writer suggests the selection of an evaluation research paradigm that would validate quantitative and qualitative data collection and analysis procedures. In addition, the writer suggests the selection of a language programme model that provides clear guidelines on the selection of evaluation designs and on data collection and analysis procedures.

The language programme evaluation should provide clear guidelines on the presentation of evaluation results to a variety of evaluation audiences. This suggestion is particularly relevant to the multi-cultural and multi-lingual South African context. In addition, the model should provide guidance to evaluators on how to communicate the limitations of the study and on how to assist the evaluation audiences in the interpretation and application of the results without being prescriptive (cf. Mackey & Gass, 2005:297-320; Creswell, 2003:49-70). A schematic presentation of the above suggestions follows in Figure 9.

Figure 9: Suggested Language Programme Evaluation Model



11.4 Core Criteria for the Evaluation of Language Programme Evaluation Models

The above analysis explored an important aspect in language programme evaluation, namely, the effectiveness of Lynch's (1996:4) CAM to facilitate a language programme evaluation process that would lead to a valid language programme evaluation.

However, the language programme process is but one important aspect of language programme evaluation models. In addition, every model has its own essential features that inform this process. The core criteria selected for the evaluation of Lynch's (1996:4) CAM examined its essential features as they became apparent in the evaluation process of the English as LoLT Course. The following discussion explores the usefulness and appropriateness (cf. Alderson & Beretta, 1992:299) of the core criteria selected and used to evaluate Lynch's (1996:4) CAM.

11.4.1 Discussion

The core criteria of flexibility, appropriateness, clarity of description, and clarity of logic were identified at the beginning of the study (cf. Chapter 2, Section 2.5.3). As previously mentioned (cf. Chapter 2, Section 2.2.2), the selection of the core criteria was informed by a consideration of the research literature on programme evaluation and meta-evaluation. These criteria structured the evaluation of Lynch's (1996:4) CAM in this study.

The criterion of flexibility (cf. Chapter 2, Section 2.5.3.1) mainly examined the ability of the CAM to facilitate the principle of diversity in the identification of the audiences, the selection of evaluation method and techniques, and the presentation of evaluation arguments from different perspectives. The flexibility criterion evaluated the language programme model's ability to facilitate an English as LoLT Course evaluation that complied with the evaluation standards of feasibility and accuracy (cf. Stufflebeam, 2001; Beretta, 1992:18). The criterion validated the course evaluation from a utilitarian pragmatist and from an interpretivist evaluation approach (cf. Table 1).

In addition, the flexibility criterion evaluated the model's appropriateness to facilitate a language programme evaluation that would comply with the interpretivist criterion of explicitness of assumptions or biases of the primary stakeholders in the course evaluation context (cf. Leedy & Ormrod, 2001:164).

The appropriateness criterion examined whether Lynch's (1996:4) CAM facilitated an evaluation that was fit to provide convincing results about the course curriculum response and impact to the primary evaluation stakeholders (fitness of the purpose) . It also examined whether the CAM facilitated the relevance of the language programme evaluation to English language learning and teaching (fitness for purpose) (cf. Chapter 2, Section 2.5.3.2). The appropriateness criterion evaluated the ability of the selected language programme evaluation model to facilitate an English as LoLT Course evaluation that could be validated from eight interpretivist criteria (Leedy & Ormrod,

2001:164-5). These criteria included the criterion of usefulness which aligns with the utility criterion (cf. Lynch, 1996) of utilitarian pragmatism.

The clarity of description criterion promoted an emphasis on accuracy in Lynch's (1996:4) CAM to facilitate a rigorous, complete and coherent language programme evaluation. These criteria promoted the validity of this language programme evaluation from an interpretivist paradigm (cf. Leedy & Ormrod, 2001:164-5). The evaluation of the selected programme models' ability to facilitate accurate evaluations in all the assessment phases of this case study (cf. Figure 3) facilitated explorations of the language programme evaluation's usefulness.

The logic of description criterion evaluated the ability of Lynch's (1996:4) CAM to sustain a logical line of argument in this language programme evaluation. This criterion also highlighted the significance of iterative logic to this language programme evaluation model. It facilitated a language programme evaluation that complied with the evaluation standard of feasibility. It promoted the purposefulness of the English as LoLT Course evaluation. The CAM therefore facilitated the validity of the language programme evaluation from an interpretivist paradigm (Leedy & Ormrod, 2001:164).

The core criteria of flexibility, appropriateness, clarity of description and clarity of logic were therefore useful and relevant to evaluate whether Lynch's (1996:4) CAM facilitated the validation of the English as LoLT Course from the utilitarian pragmatist and interpretivist programme evaluation paradigms.

A reflexive comment on the selection of these four core criteria considers whether the utility criterion (cf. Lynch, 1996) should not have been included as a fifth criterion. However, the overall research strategy of utilitarian pragmatism and the pragmatic stance of the evaluator would over-emphasise usefulness as a validation criteria. This over-emphasis of one criterion would lessen the effectiveness of the other core criteria which, in turn, would decrease the scope and effectiveness of the meta-evaluations in this case study.

11.4.2 Recommendations

The core criteria of flexibility, appropriateness, clarity of description, and clarity of logic were useful in evaluating the CAM. These criteria may be considered for the evaluation of future LoLT language programme evaluation models.

In addition, the writer recommends a thorough selection process that should precede the selection of core meta-evaluation criteria for a particular evaluation. The selection process should include an analysis of the language programme evaluation purpose and context, as well as a consideration of the research literature on programme evaluation and meta-evaluation. The selection process of the core-criteria that was followed in this study provides evidence that a focused selection process increased the usefulness and relevance of its core criteria.

11.5 The Broader Education and Language Research and Development Context

This section offers some reflections and suggestions that could be useful and relevant to the broader education and language research and development context.

11.5.1 Contributions of this Study

This study explored a process of language programme evaluation that has not been examined before. In addition, this case study applied and evaluated a language programme evaluation model that has not been tested before in the particular evaluation context of the four IDDP schools in Phuthaditsjhaba. This study produced valid findings that would otherwise not have been known to various groups of stakeholders (funders, researchers, education authorities and officials at various levels, and participating teachers). It has critically evaluated the selected language programme evaluation model and has suggested a language programme evaluation model for future language programme evaluations. It has also identified, tested and suggested meta-evaluation criteria for the evaluation of language programme evaluation models.

11.5.2 Recommendations for Further Research

The writer recommends further research in the following language learning and teaching areas: the conceptual development and transfer in English language learning and teaching; strategies and techniques to learn and teach both language and academic content; grammatical error identification and prioritization; strategies and techniques in process writing; curriculum analysis and formulation to accommodate diverse styles of language learning and task-based language learning and teaching.

In addition, the writer recommends further research in the following learning and teaching areas: the interrelatedness of language programmes and language learning contexts; the analysis and formulation of practical language policies and guidelines at school level to create a supportive language learning context; the implementation of professional working groups as support networks for the continued professional

development of teachers and continued research in co-operative and collaborative learning and teaching.

The writer also recommends further research in the following language programme evaluation areas: the development of language programme evaluation models based on mixed evaluation research designs; the development of relevant language programme models in the multi-lingual and multi-cultural South African context and the development of core evaluation criteria and frameworks to quality assure the application of language programme evaluation models in the South African context.

11.5.3 Relevance of the Course Findings and Recommendations to the Broader Education and Language Research and Development Context

The findings and recommendations presented above apply to the English as LoLT Course as a case study. Stake (2005:460) comments that the “utility of a case research to practitioners and policy makers is in its extension of experience”. He explains that people draw, from the description of an individual case, implications for other cases.

The findings and recommendations of the English as LoLT course and Lynch’s (1996:4) CAM may have implications for the development of courses and for further research in the broader context of education and language development. Some of these implications are briefly discussed.

A major challenge in the development of teachers’ English language learning and teaching strategies is the exploration of conceptual development and transfer. Setati, Adler, Reed and Bapoo (cf. 2002) highlight the need for further research in this area in an article called, “*Incomplete journeys: Code-switching and other language practices in mathematics, science and English language classrooms in South Africa*”. They explain in the abstract that they have explored the reception and production of language through code-switching, exploratory talk and discourse-specific talk in mathematics, science, and technology classrooms in South Africa.

The journey metaphor is used to describe how teachers and learners move from informal, exploratory talk in the learners’ main languages to discourse-specific talk and writing in English. A key finding of the study is that “few teachers and learners completed this complex journey and that the constraints differed across classroom context, level, and subject being taught”. The exploration of language learning and teaching strategies

and techniques in the English as LoLT Course to develop learners' BICS or informal language in order to develop their CALP in English relates to this study.

The further development of teachers' knowledge and skills in designing language learning techniques that address the diverse language and cultural needs of their learners relates to the South African and world-wide language learning contexts. Reid (2005:117-130) emphasises the need to develop teachers' skills to distinguish between ear and eye learners. Reid (2005:119) explains that ear learners' acquire oral proficiency or BICS, whereas eye learners acquire CALP. Teachers' ability to identify the different language errors made by ear and eye learners enables them to formulate curriculum that accomodates this diversity in English language learning. Reid (2005:120) highlights the relevance of this field of research in applied linguistics to teacher training.

In addition, the exploration of the interaction between the curriculum and the learning milieu to provide effective and efficient support to language learning and teaching is a major area for education development and for research. The impact assessment of the English as LoLT Course has highlighted two areas for further enquiry. The development of school language policies and the effective functioning of professional working groups as support structures for the continuing professional development of teachers.

The need for schools to review their interpretation of the National Language-in-Education Policy in the South African education context has been expressed in the Free State Systemic Evaluation Report for the Intermediate Phase (2005:xii). Baldauf (2005:227) also expresses the need to further examine the relationship between macro models and frameworks for language planning and micro studies in the field of applied linguistics.

The quality of the development programmes produced from collaborative action research initiatives is furthermore a serious concern in the continuing professional development of teachers. The concern for quality assurance in the development and evaluation of language learning and teaching programmes initiated this study (Chapter 1, Section 1.2). The introductory section to this study highlighted the insistence of the National Policy Framework for Teacher Education and Development in South Africa (2007a:19) on quality service providers and professional development activities (cf. Chapter 1, Section 1.2). The need for quality assured language programmes has raised the level of urgency for further research in the field of language programme evaluation. The need for further research in language programme evaluation models that explore the South African multi-lingual and multi-cultural education and evaluation contexts and

their interrelatedness to the language learning programmes, has become a matter of priority.

11.6 Conclusion

The case study of the English as LoLT Course and the evaluation of Lynch's (1996:4) Context Adaptive Model have explored the challenges to develop quality English language learning programmes that enhance the multi-lingual and multi-cultural context in South African education, and especially in this case, rural education.

The role of the teacher in facilitating quality English language learning and teaching has emerged as central to this education context. This study concludes with an emphasis on the need to further develop teachers' language learning knowledge and skills, especially in using English as the LoLT. The study also emphasises the potentially significant role of professional working groups to provide support networks for the sustainable self-development of teachers as reflective practitioners, language learning facilitators, and curriculum developers. Lastly, the emphasis on evaluation and on meta-evaluation has been the core of this study and has increasingly become a central focus for further research in the journey toward quality assured language learning programmes in South Africa.

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