

It's Time to End the Decade of Confusion about OBE in South Africa

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It has been exactly ten years since I first set foot in South Africa to conduct a nationwide lecture tour on OBE. That was October, 1997. In venue after venue for four solid weeks, I addressed thousands of educators in all parts of the country and was often introduced as “The Father of OBE.” Each time that happened I would laugh with the audience and explain that, for this title to be true, I would have to be at least 500 years old!

OBE's Defining Elements

OBE's “Real World” Examples and Legacy

Why? Because what I understood to be the defining elements of an Outcome-Based approach to instruction, assessment, and credentialing had existed in “the real world” in many forms – in some cases for many hundreds of years. The examples I cited in my first major book on OBE (*Outcome Based Education: Critical Issues and Answers*, 1994) and in these South African presentations included:

The Craft Guilds of the Middle Ages in Europe

The countless Apprenticeship Programs in the Skilled Trades that evolved from them

Technical Training of all kinds in the military

Merit and Honour Badges in Scouting/Guides

Karate, SCUBA, and First Aid instruction

Pilot Training and Flight Schools

Snow Skiing instruction

These highly diverse models thrived over the course of centuries in non-education settings because they were positive, practical, realistic, and highly effective for the mainly adult learners who participated in them. And they shared four major characteristics that, I explained in my lectures, defined them as “Outcome Based” from my perspective.

First, each of them had clear, tangible performance criteria that defined what it meant to be competent, proficient, qualified, and/or professional – often at clearly distinguishable levels of demonstrable expertise. And in many cases high levels of skill had to be reached before the learner was allowed to “perform” on his or her own, simply because the activity itself was inherently dangerous to self or others (e.g., firing weapons, fighting skills, underwater exploration, flying airplanes, sliding downhill on snow and ice). Furthermore, these demonstrations required applied skills that went far beyond “book knowledge” or passing

paper/pencil tests – something that traditional academic education has not encouraged or honoured.

Second, these criteria were used to define/shape three key things: 1) the credential or license the learner received for successfully demonstrating the established criteria, 2) the precise nature of the performance assessment that would be conducted so that the learner could demonstrate what had been learned, and 3) the design of the instructional experiences that would directly and eventually assist the learner in demonstrating the defining performance criteria successfully.

Third, “success” occurred WHEN, and WHENEVER, the learner could demonstrate ALL of the defining performance criteria in a “live”/authentic performance. Learners were not penalized for making mistakes while learning, and they were allowed multiple opportunities to develop and demonstrate their eventual/required/highest level of performance. Their goal was to have learners “get good,” not to be perfect the first time they tried.

Fourth, in most cases learners could proceed at a pace that suited their particular rate of learning – meaning that neither instruction, assessments, nor credentials were defined by, or limited to, specific calendar dates or specific blocks of time.

Conflicting Paradigms

I quickly came to realize that these four distinctive features combined to form a “paradigm” of learning and credentialing that was just about the opposite of how the education systems of the world were defined and operated. In the OBE models cited above, successful outcome performance is the clear/fixed/pre-determined/known/constant factor in the equation, and time is the flexible/variable/adaptable factor. In formal education, however, exactly the opposite pattern exists: time is the clear/fixed/pre-determined/known/constant factor, and learning success is the flexible/variable/ adaptable factor.

In fact, what I realized and wrote about nearly forty years ago was that the clock, schedule, and calendar were the major definers and drivers of how education systems in North America and elsewhere in the “modern” world were structured and operated. There were fixed dates for instruction to start and end, and both access to education and the opportunity to learn and be successful were determined by those specific dates on the calendar. Between those dates lay what I called “the window of opportunity” for learners, and this window was both limited and limiting for all learners – the same constrained block of time repeating itself year after year. These windows were also severely constraining to educators who had to cram their ever-expanding curricula into these static and fixed time boxes, no matter how long it might actually take learners to grasp and master it.

From all of this, and more, I clearly saw that education was a deeply entrenched, TIME-BASED institution that inherently put “fast learners” at a great advantage, and slower ones under enormous pressure if they had any hope of “keeping up” or succeeding. Essentially everyone starts at the same starting line and races to the end, with the fastest always winning, year after year. Furthermore, I could not see how a system could be both Time-Based and Outcome-Based at the same time since Outcome-Based models inherently required

flexible/expanded opportunity conditions, and Time Based systems inherently embodied fixed/uniform conditions.

Hence, there seemed to be a serious dissonance between what OBE models embodied and modern education systems were structured to facilitate – something that South African policy makers may not have realized a decade ago when they so enthusiastically embraced and endorsed OBE as the educational paradigm that was to drive the country’s educational future. I explained this to my South African audiences, and warned them that, from all I could see at the time, Curriculum 2005 fell far short of aligning with these fundamental features of the OBE paradigm.

OBE’s Four Operating Principles

Another glaring omission from all the Curriculum 2005 rhetoric that I read and heard in 1997 and beyond was what my colleagues and I regarded as the operational heart of OBE – what we called its Four “Power” Principles. These Principles strongly resemble the defining features of OBE models described above, and they are the guideposts for shaping Outcome-Based practice in schools and in classrooms. Over time, we discovered that these Principles expanded what we called “the conditions of success” in schools and classrooms; that is, they directly helped students learn more successfully, and be formally acknowledged for what they ultimately accomplished. In short form, they are:

1. **Clarity of Focus on Outcomes of Significance:** Having a clear focus on the ultimate learning results educators desired for students; continuously sharing, explaining, and modeling that clear focus with them from the very beginning of any learning experience; and keeping all instruction and assessment directly aligned and consistent with that desired result.
2. **Design Down from Your Ultimate Outcomes:** Designing curriculum/learning experiences/instruction systematically BACK from that ultimate, desired end – putting in place the enabling skills that provided a clear pathway to that end, and always keeping it in sight.
3. **High Expectations for High Level Success:** Establishing and consistently employing “high expectations” regarding every student’s ability to eventually reach those ultimate learning results in a quality way – insisting that no student is to be “written off” as incapable of learning successfully.
4. **Expanded Opportunities and Support:** Expanding the number, range, and kinds of opportunities students are given to learn and ultimately demonstrate their learning successfully. This requires that time be viewed and used as a flexible resource, not as a calendar and schedule-bound “definer” of the educational process.

For the past three decades our admonition to teachers and principals has been: “Apply these four Principles consistently, systematically, creatively, and simultaneously, and you’ll be as close to implementing genuine OBE as you can get.” They are described more fully in *Curriculum 2005: A Guide for Parents*, a book I co-authored in South Africa with Anne Schlebusch in 1999.

The Changing Face of “OBE”

Prior to my October, 1997 lecture tour, I had met with a diverse team of South African educators that July. It was quite apparent that they were not aware of the philosophical grounding that underlay advanced OBE designs in North America, nor the “cutting edge” developments that OBE thinking and practice that had taken place there between the 1970’s and 1990’s. Happily, when I explained these major changes during a daylong workshop for them, they were eager to learn more and immediately set in motion the procedures that led to the lecture tour that October.

Essentially what began as the segmented, content-specific OBE thinking of the 1970’s evolved into a much more integrated approach to learning and instruction in the 1980’s, and that approach, in turn, took a further leap forward toward “future focused, life-performance” outcomes and implementation during the early 1990’s. The 1970’s approach came to be called “**Traditional OBE**”; the 1980’s approach got named “**Transitional OBE**”; and the 1990’s and beyond approach became widely known as “**Transformational OBE.**” From the North American perspective, the latter was, indeed, transformational in its conception, philosophy, design templates, and potential practices (which I will explain shortly), but the term created considerable confusion in South Africa where the word “transformation” mainly meant the recent shift from apartheid to democracy.

I wish I had known this before coming over on that first trip because I could have explained this important difference in wording earlier than I did. Initially when South Africans described Curriculum 2005 as “transformational”, I winced, because I saw it primarily as an example of Traditional OBE with aspects of Transitional OBE, but not as something more advanced. Slowly I began to grasp the differences in meaning, but it didn’t alter my critical view of Curriculum 2005 as it was being represented and taught in the late 1990’s.

The Fundamental Meaning of “Outcomes”

The greatest irony in the major school reform movement in North America known as OBE was that until the mid-1980’s there was no clear definition of an Outcome guiding the movement. When this significant breakthrough finally happened, the leading reformers and practitioners in the movement came to agree that an Outcome was “**a culminating demonstration of learning.**”

For us, “**demonstration**” meant that learners would actually DO something tangible, visible, and observable – e.g., describe, explain, design, construct, produce, negotiate, operate, etc. – with the concepts and content embodied in the typical curriculum. And we further asserted that “**doing required skill and Competence, not just knowledge and understanding.**”

Just this first part of our definition shook the movement, because it made Competence and its demonstration at least an equal part of any Outcome statement, along with the content that had always been there. And it brought to centre stage the importance of “**demonstration verbs**” (such as those above) – the words in an Outcome statement that would actually determine the nature of the desired demonstration and the kind of skill/Competence that needed to be developed. It was clear at the time that adding real competence to the learning agenda of traditional schools was seen by many as a formidable challenge (and even

paralyzing threat) because it called into question the inherent limitations of centuries of curriculum, instruction, and assessment practices that focused almost exclusively on content acquisition and retention.

In addition, my colleagues and I came to realize that demonstrations take different forms, ranging from “micro skills” (like dotting i’s and crossing t’s) to the extremely complex, macro configurations of competence represented in what are known as “life roles” (e.g., citizenship, job/career, parenting, etc.). (For a more complete analysis of this fundamental issue, please see Chapter 3 in my 1994 OBE book, and Chapters 3 and 10 in my latest book, *Beyond Counterfeit Reforms*, published in 2001.) This quickly evolved into a metaphor that likened Outcomes to the elements in a cathedral. Were Outcomes the individual bricks/stones, the different walls, or the cathedral as a whole? Those of us who saw them from a macro perspective argued that:

A pile of bricks, no matter how well crafted, is not a wall. And a group of walls, no matter how sturdy or beautiful, is not a cathedral. If you want to end up with a cathedral, you have to start with that global vision in mind, and “design down” from there.

This, in turn, opened the door to the most fundamental of all issues surrounding an OBE approach: **What is the “ultimate purpose” of education?** To teach a huge collection of disconnected facts and micro skills (bricks)? To develop broad knowledge and high-level competences (walls)? To develop healthy, informed, contributing human beings (cathedrals)? Whatever your answer, we argued, it is going to be determined by, and embodied in, the things you regard as your ultimate Outcomes. In South Africa’s case, that answer was at least implicitly embodied in what were called the Twelve Critical Outcomes. Their strengths and limitations are discussed in more detail later.

Closely tied to the intense discussion about the micro/macro nature of Outcomes as demonstrations was the meaning of the second key word in what defined an Outcome, namely: **“culminating.”** It too, as we discovered, carried enormous implications for altering curriculum, instruction, assessment, marking, and reporting practices. For us “culminating” represented the synthesis of two key concepts: one was **“ultimate/highest/final,”** and the other was **“at or after ‘the end.’”** In other words, it represented what we wanted learners to be able to do/demonstrate as the culminating integration of all the learning, practice, and preparation that had preceded it – what they could “finally and ultimately” do as the result of all the learning experiences and practice they had engaged in – not simply the assignments, practice, preparation, and trial attempts themselves.

But this raised a profound question for all concerned: **At or after “the end” of what?** The week? A unit of work? The marking period? The term? The semester? The course? The year? The time they are with us in our school? Their entire career as students in our schools? It was easy to imagine a micro demonstration of a micro skill related to a micro amount of content (Traditional OBE), but the farther we went down this list of questions and the bigger the time blocks and/or chunks of curriculum/learning under consideration became, the more puzzling and difficult it was to answer them.

Outcomes of Significance

After many months of frustrating and painful discussions and false starts, a preliminary answer finally emerged: the notion of an “**Outcome of Significance**”: something that “**really mattered in the long run,**” long after that particular segment of curriculum or time block was over – something that learners could ultimately “**take out the door and apply**” in their community and career lives when they “exited” the system. From this intense period of design and development work eventually emerged the notion of “**Exit Outcomes**” – the ultimate “role performance” abilities and qualities that would empower and support learners in the future they faced (Transformational OBE). In other words:

Between the 1970’s and the 1990’s, the fundamental understandings about Outcomes and their role in shaping curriculum, learning, and learning systems had evolved dramatically from micro thinking and applications to macro thinking and designs; and from a subject matter focus to a future-focused, life performance orientation.

Most of my 1998 book *Paradigm Lost* illustrates this dramatic shift in perspective and learning system design.

Why were these explorations and developments so difficult and frustrating for us to implement during this volatile period in the late 1980’s? For three key reasons, all related to our initial in-the-box/ “educentric” paradigm of education. First, because as subject-bound educators we were not accustomed to thinking of “ultimate/final” BIG demonstrations of competence that would embrace large amounts of integrated, cross-disciplinary content, concepts, and skills. Second, we routinely thought of grade level subjects and high school courses as ends in themselves that needed no further reason to justify their existence. (They were simply “good” because they were mandated/required.) And third, we were NOT accustomed to thinking about which things in a grade nine course, for example, learners would definitely be carrying out the door as skills and abilities four years later that would equip them for success in the life roles they were about to assume.

South Africa’s Framework of Critical Outcomes

Given the painstaking work that my colleagues and I had undertaken during the previous decade to develop, refine, and apply our notions of Outcomes of Significance and Exit Outcomes, it was a major disappointment in 1997 to see South Africa’s framework of “Twelve Critical Outcomes” and the sixty-six “Specific Outcomes” that had been derived from them. They were not written in Outcomes language, they were not developed or expressed in a consistent format, and, from all I could see, they weren’t being used to shape curriculum, instruction, or assessments very directly or effectively either. Consequently, I couldn’t see how Curriculum 2005 was in any way really “Outcome” based, given that the framework of Outcomes on which this national reform was presumably based was so weak, inconsistent, and peripheral to the curriculum changes being proposed.

So after several years of hearing the Twelve CO’s categorized and labeled by various officials in a variety of ways – none of which made any sense – I decided to undertake a theoretical design exercise and rigorously and objectively translate them, if I could, into a “transformational Exit Outcomes/role-performance” format, based on what they seemed to

intend/ imply. This exercise was an attempt to uncover their hidden/latent potential and to elevate their significance and use. The results of my work were graciously published in the June, 2004 issue of *Perspectives in Education* under the title “Using the SAQA Critical Outcomes to Empower Learners and Transform Education.” In a nutshell, it showed that the deeper potential of the framework could, if it had been written, understood, and applied in “transformational” terms, have allowed the system to develop young people who were:

Prudent, organized Life Managers, guided by an ethos of Reflection and Improvement

Conscientious, Global Stewards, guided by an ethos of Caring and Commitment

Active, collaborative Citizens, guided by an ethos of Honesty and Reliability

Skilled, productive Contributors, guided by an ethos of Diligence and Quality

Resourceful, entrepreneurial Opportunity Creators, guided by an ethos of Initiative and Innovation

However, nothing resembling this kind of framework ever emerged from the National Department of Education, either before or after the major review of Curriculum 2005 in 2000 and 2001.

Defining the Term “Outcome-Based Education”

Besides devoting an enormous amount of time to bringing rigor and insight into developing and implementing Outcomes frameworks that were truly significant in shaping learners’ futures, my colleagues and I also realized that there was enormous, often-overlooked power in the term “**Based**” that also affected the meaning of OBE.

Clearly, the term “base” means ground or foundation – the deep, solid layer from which you build/construct your design. As I explained in my 1994 OBE book and countless related papers and presentations before and since, “Based” in this context means five closely related things: 1) defined by, 2) designed from, 3) built on, 4) focused on, and 5) organized around. This combination of five things implies something much deeper and more impactful than simply being “oriented toward” and/or “related to” something. The term Based makes Outcomes the true foundation and driving force of an OBE model.

Finally, we viewed the term “**Education**” in terms of all of its systemic, structural, operational, and cultural elements – not simply as “formal curriculum” and its assessment, as seemed to be the case with Curriculum 2005. This included education’s grouping and promotion structures and conditions, its credentialing system, its organization of physical space and use of human and tangible resources, its organization of learning experiences, its system of assessment, marking, and credentialing, its structuring and use of time, etc.

So, in a straightforward integration of the three key words in the label “OBE,” my colleagues and I have consistently interpreted Outcome-Based Education to mean:

Defining, designing, building, focusing, and organizing everything in an education system on the things of lasting significance that we ultimately want every learner to demonstrate successfully as the result of their

learning experiences in that system.

This, we realized, represented a profound challenge that conventional education systems were very unlikely to undertake; and nearly four decades of work and technical assistance to schools and education systems of all kinds across the globe has proven us right.

Why? Because no national or state/provincial system that we know about has a framework of future-focused Exit Outcomes on which it can Base/define/design/build/focus/organize education. And without such a framework it's impossible to "Base" Education on "Culminating Outcomes of Significance." In addition, "real" OBE is almost impossible for an educational system to implement because it requires such profound levels of change – in paradigm thinking, in mission and purpose, in organizational and structural arrangements, in the very meaning of teaching and curriculum, in the structuring and use of time, in resource allocations, in professional training, deployment, and support, and in the role of the entire system in its society's social fabric and economy – that the political, cultural, and economic leaders of a country cannot bring themselves to address the enormity of the task.

That is why, when asked where one can see "real" OBE in action in education, I say, "Nowhere. But there is lots of CBO pretending to be OBE." And that is certainly the case with Curriculum 2005 and the Revised National Curriculum Statement.

The Great CBO Compromise

From the outset of what was called OBE in North America over thirty years ago, the best that most educators could do in the 1970's and 1980's was what I called "sprinkle outcomes over the top of what they were already doing – but call it 'OBE' nonetheless." In other words, the fundamental organizational, structural, and operational features of their schools didn't change at all – they were still Time-Based and boxed-in in all respects – but they had introduced some version or another of "Outcomes" into their practices and consequently saw themselves as Outcome-Based.

After a decade or so of observing this, I realized that these typical features of traditional schooling and pseudo-OBE implementation all related to words that fit a similar pattern of letters: C, B, and O. The most prevalent and significant of them were:

Curriculum Based Outcomes

Content Bound Objectives

Calendar Based Opportunities

Cellular Based Organization

Contest Biased Orientations

Convenience Based Operations

Convention Bound Obsolescence

I will briefly consider the first four of them.

Curriculum Based Outcomes

The most prevalent adaptation of the OBE approach in education across the world has been to write “outcomes” about the curriculum that already exists and is being taught – usually around the conventional academic subject areas and grade levels. Hence, the curriculum in those separate subject areas often gains more focus, and its priorities become clearer, but its conceptual grounding, governing assumptions and concepts, subject matter isolation, and substance are little affected. Teachers continue to teach what they know how to teach, assessment and marking practices are little affected, students are expected to assimilate that content and demonstrate it on conventional paper/pencil tests, and university admissions departments remain satisfied by dealing with a supposedly more precise set of achievement measures that leave their own curricula and organizational structures unchallenged and unchanged.

This adaptation has now become the central feature of what is internationally known as “the standards and accountability movement,” with its major emphasis on standardized test performance, quite akin to the Matric Exam system in South Africa – often with major backing from the global industries in the participating countries. From an OBE perspective, Curriculum Based Outcomes is like the tail wagging the dog.

Content Bound Objectives

In conventional educational practice across the world, “**content is king.**” Virtually everything in the system is organized around the content and concepts educators want learners to assimilate/remember/understand/believe within the traditional academic disciplines. And, in the early days of OBE adaptation in North America, this content-specific focus went unchallenged. At the school and classroom levels teachers were taught to translate their conventional lessons into “objectives” that gave both them and their students greater focus, and, in some cases, raised learning expectations.

But with the realization in the mid-1980’s that Outcomes were actually culminating demonstrations requiring competence/skill/application, the narrowness and limited nature of Content Objectives became readily apparent. In the main, they were simply “micro memorization outcomes” focused on micro chunks of content relevant to micro blocks of time (days and weeks) with no larger purpose or tie to any larger, more significant culminating outcomes. Moreover, the essential element of competence/skill/application was altogether absent from most of them, and it led many of us to realize that “**content learning is one-dimensional**” – that is, it requires a limited range of mental processing abilities, but little in the way of application of those processes in the complex role functioning required in modern life.

Calendar Based Opportunities

It is my observation that everything in formal education systems is defined and organized around specified blocks of time – from levels of schooling to school years and grade levels, down to semesters, terms, weeks, days, and class periods. The important thing here is that these blocks of time are used by “modern” education systems to define and determine how long (i.e., duration), how often (i.e., frequency), and when (i.e., timing) opportunities to learn specific or essential things in the curriculum are made available to students, AND for

students to demonstrate that they've learned them. Most often this follows a pattern that I have called in my writings: **fixed time/single opportunity**. Things in the curriculum are offered to students once on a specific schedule, and they are compelled either to get it then, the first and only time, or they may never have another chance later.

Because testing, marking, and reporting are also uniformly tied to those same familiar and deeply institutionalized time blocks, opportunities to learn generally end once learning has been assessed, marked, recorded, and reported. Hence, any learning or improvement that occurs after marks are issued is never recorded, and students receive no formal recognition for having learned after the designated time block has ended. This deeply entrenched practice makes it profoundly difficult for schools to use time and opportunity flexibly, and to offer students legitimate "expanded opportunities" to improve and reach high performance levels after formal instructional time has ended. Hence, it requires enormous ingenuity and courage for educators to implement the flexible/variable/adaptable time and opportunity factor inherent in authentic OBE because the entire Time-Based organization of education mitigates against it.

Cellular Based Organization

Another of the defining features of almost all education systems is what in North America is called "the self-contained classroom" – that is, one teacher with a given group of (grade level) students in one room for a fixed amount of time, usually a semester or full school year. This culturally institutionalized and structurally limiting organizational feature of most schools makes it difficult for teachers to team with others and create the instructional and time flexibilities necessary to respond to differences in students' learning rates and learning styles. In my experience, the most effective attempts of schools to operate in genuinely Outcome Based ways occur when there is extensive teaming within and across grade levels and subject areas, especially when the entire staff is addressing a common framework of higher-order competences, rather than Content Objectives.

Eliminating the Decade of Confusion

It is regrettable that the message I carried to South African educators in 1997 about OBE as I had come to know it had little, if any, influence on South African educational reform policy. Had there been stronger conceptual understanding and agreement regarding the issues described above, I believe the country's educational leaders would have been able to make a more constructive choice about the reforms they sought to implement during the first Mandela government.

First, recognizing the major disparities between their Curriculum 2005 strategies and the fundamentals of genuine OBE, they could have chosen bring C2005 more strongly into alignment with OBE and modified their initial course of action considerably. From my perspective, that decision would have strengthened their reforms significantly, even though the resulting OBE implementation may have never approached the maturity and effectiveness of more fully developed OBE attempts in the U.S. and Australia.

Or, recognizing these major disparities, they could have chosen to drop the OBE label altogether and thereby reduce or avoid a lot of the confusion that was generated by implying

that education would have to go an enormous change in order to implement Curriculum 2005/“OBE”. Yes, there were significant changes related to the democratization of both the society and the education system that had to be addressed, but C2005 itself did not represent a major paradigm shift in educational thinking and practice. Its major features were significantly bound within the traditional CBO configuration described earlier, and by continuing the Matric and annual examination systems, the government kept everyone locked into traditional/conventional modes of thinking about learning, curriculum, achievement, assessment, and qualifications. In addition, the extreme range of schools and teachers in South Africa at the time made a national “one size fits all” reform strategy and implementation schedule completely unworkable – OBE or no OBE.

Equally regrettable was my inability to engage the country’s academic community in a serious consideration of OBE beyond Curriculum 2005 itself. The outspoken Curriculum 2005 critics of the day – like Jonathan Jansen and Linda Chisholm – were attributing many of the weaknesses, dangers, and failures that they saw in Curriculum 2005 and the National Department of Education’s policies, curriculum focus, and implementation strategies to OBE in the larger sense. And I had no platform, beyond the original lecture tour, for addressing these misunderstandings.

So now, with a decade of confusion about OBE behind us, I would encourage my South African colleagues to stop referring to OBE in any form. It never existed in 1997, and has only faded farther from the scene since. The real issue facing the country is to mobilize behind educational practice that is sound and makes a significant difference in the lives of ALL South African learners. Empty labels and flowery rhetoric are no longer needed; but principled thinking and constructive action are.

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