

## **REPORTBACK**

# **THE EDUCATION ACTION SCORECARD INITIATIVE EDUCATION WEEK 2010**

*"Given the generous proportion of the national budget allocated to education and the energy all stakeholders have invested to date, what factors (issues, challenges, opportunities, worries) must be managed excellently in order to turn around the current poor outcomes?"*

**REPORTBACK**  
**THE EDUCATION ACTION SCORECARD INITIATIVE**  
**EDUCATION WEEK 2010**

**Purpose, Intention and specific desired Results**

South Africa's education system is complex, messy and dynamic. The Education Action Scorecard Initiative provides a process and method to make sense of it all and to be clear and confident about strategy and its implementation..

The Education Action Scorecard Initiative aims to encourage and enable stakeholders from government, labour, business and civil society to collaborate in building and managing a range of Education Action Scorecards that effectively:

1. Define a guiding set of clear collective objectives.
2. Show how key elements interact and interrelate with each other to form a system that needs to be managed as a whole.
3. Highlight the gaps between what needs to be managed and what is currently being managed.
4. Enable stakeholders to prioritise and/or design interventions that together form a coherent strategy that will actually improve desirable results.
5. Focus management energy and resources and makes it possible to measure progress, or lack thereof, in areas that are critical for success.

This report-back has been prepared to give stakeholders who participated in the Education Week 2010 initiative feedback about how their data and information was used and the outcome of their contributions.

We hope this document will:

- Clarify the value of this simple, collaborative, non competitive approach to consensual strategic planning, monitoring and evaluation.
- Help leaders and managers imagine the impact and value of building Education Action Scorecards at all levels of South Africa's education system.
- Inspire all stakeholders to take the next steps toward building an Education Action Scorecard of their own.

## **The Partners**

The Education Action Scorecard Initiative is a joint partnership between Rookan Podesta of the Field Education and Dylan Wray of Shikaya and Dr Julian Day, of Collaborative Projects.

**The Field Education** is a collaboration by Rookan Podesta and Dylan Wray who are founding partners of:

- The [Building on Success Programme](#) for Curriculum Advisors.
- The **South African Curriculum Advisor and Teacher Support (SACATS) conferences** in 2007 and 2008.
- [The Education Week Conference and Learning Expo](#) which now incorporates SACATS.
- [Education Conversations](#) which engage South Africans in constructive, solution-driven conversations about the issues facing education today.

**Dylan Wray** is the Director of [Shikaya](#), a non-profit organisation with a vision of a South Africa in which every learner is inspired through enthusiastic, committed and professionally prepared teachers to become responsible citizens in our democracy, valuing diversity, human rights and peace.

**Rookan Podesta** works with organisational leaders, managers, change agents and team builders who need to lead collaboratively in order to get things done, and who want to develop their team or group's ability to collaborate effectively.

**Julian Day** specialises in facilitating organisational problem solving, complex projects and project crisis turnaround. He has developed practical action learning approaches to facilitate collaboration, group sense-making and sound intervention design in complex situations. He is committed to the growth and development of people so that they can manage the complexities of their work and lives creatively.

Full biographies are appended to this report.

## THE EDUCATION ACTION SCORECARD INITIATIVE EDUCATION WEEK 2010

Our boundary question was:

"Given the generous proportion of the national budget allocated to education and the energy all stakeholders have invested to date, what factors (issues, challenges, opportunities, worries) must be managed excellently in order to turn around the current poor outcomes?"

In the months preceding education week 2010 we approached a wide range of stakeholders with diverse perspectives and in some cases divergent needs and asked them to help identify the key issues and challenges that needed to be addressed. We eventually had about 184 key variables identified from 23 respondents:

- 9 Teachers/Principals
- 4 Department of education
- 4 NGO/NPO sector
- 6 Business
- 0 MEC's / labour



*Figure 1:  
Logically grouping issues  
and challenges into key  
variables*

Then on the 28<sup>th</sup> of September 2010, The Education Action Scorecard Masterclass (about 26 delegates) at Education Week was tasked by Julian to:

1. Take the mess of factors and to logically group them. ( See figure 1)
2. Specify their inter-relationships in order to produce the resulting scorecard. (See figures 3 and 4)
3. Reflect on the focus of their current activity and the results they were getting in relation to the structure of the variables.(See figure 5)

Figure 2: Formulating the boundary question

## Making sense of the Boundry Question:

Given the generous proportion of the national budget allocated to education and the energy all stakeholders have invested to date, **what factors (issues, challenges, opportunities, worries) must be managed excellently in order to turn around the current poor outcomes?**

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## Interrelationship Diagram

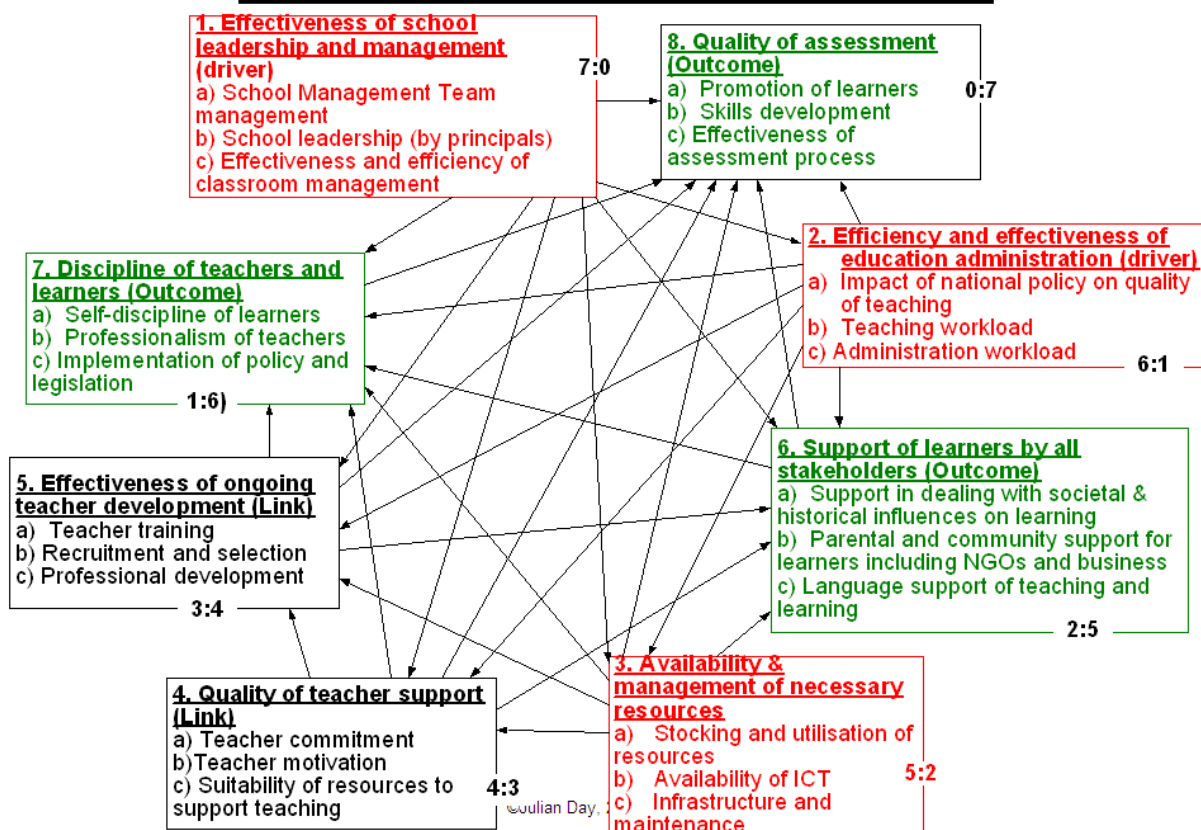
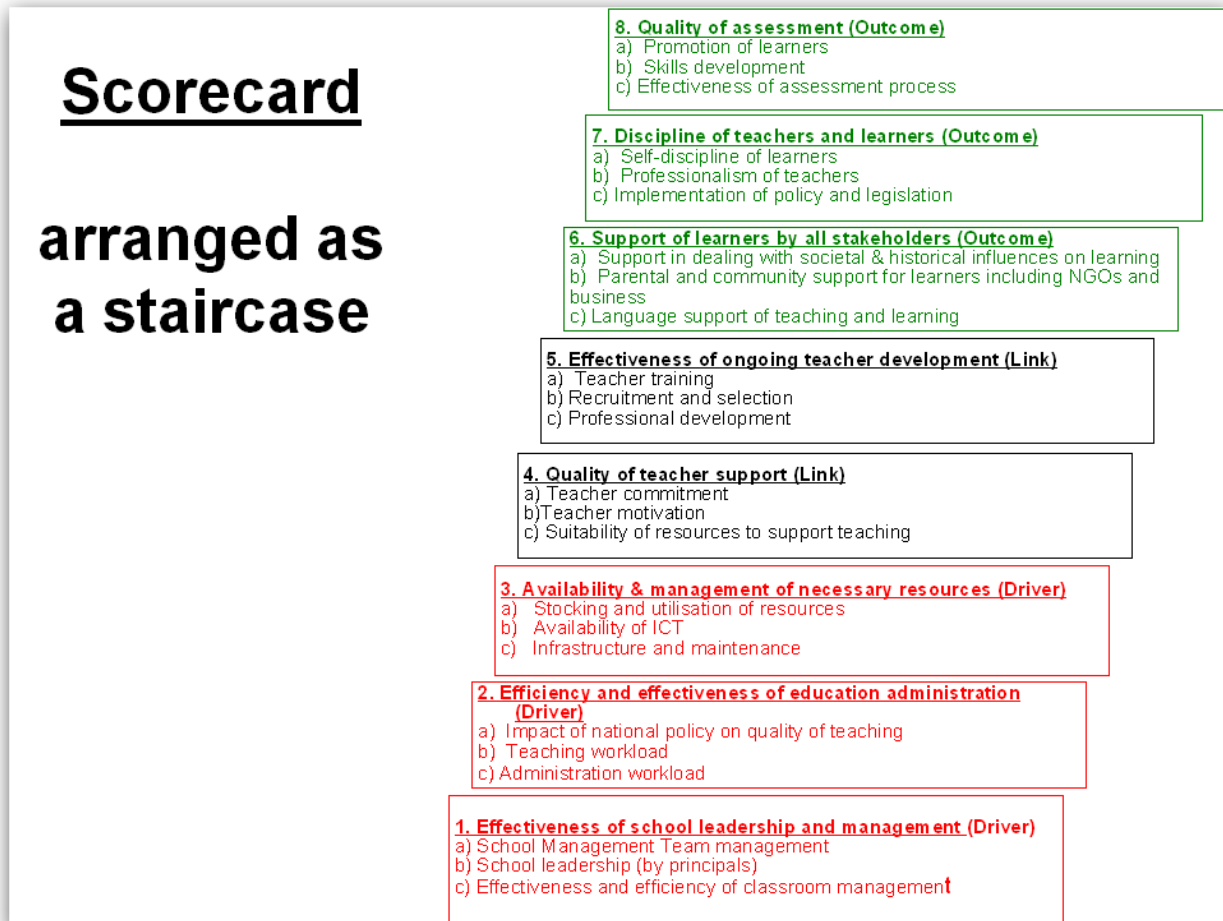


Figure 3: Making sense of the 'mess' of variables

Figure 4: Defining input, transitional and output variables – a logical scorecard



## Assessing the Scorecard

	Avg energy	Overall State	Comment	Assessment
8. Quality of assessment (Outcome)	20		Well below par. Very poor	
7. Discipline of teachers and learners (Outcome)	9.6		Well below par. Dismal	
6. Support of learners by all stakeholders (Outcome)	9.2		Below par.	
5. Effectiveness of ongoing teacher development (Link)	6.8		Well below par. Very poor	
4. Quality of teacher support (Link)	6.4		Well below par. Very poor	
3. Availability & management of necessary resources (driver)	22.6		Par	
2. Efficiency and effectiveness of education administration (driver)	13.6		Well below par. Dismal	
1. Effectiveness of school leadership and management (driver)	11.8		Well below par. Dismal	

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Figure 5: Assessing effort and state

## **Systems theory and tools**

Delegates were given some necessary input regarding the systems approach and some key principles and practical tools. This included:

- How to formulate a good boundary question
- How to identify system variables that need to be managed effectively
- How to plot their interrelationships
- How to determine which were system inputs and outputs

## **The value of this approach**

Some examples raised in discussion at the end of the session. In order to build the scorecard:

- Delegates could only 'serve' the data respondents (you) had provided - despite their own bias which was surfaced quickly.
- Delegates were required to collaborate via a series of robust learning discussions to determine the variables and the final scorecard.
- Individuals needed to understand the system of variables, how they interact and which of them were the high-leverage variables.
- No single individual could dominate the process and outcome.
- There was unanimous consensus regarding the logic of scorecard and its corresponding red 'input', black 'transitional' and green 'output' variables (see figure 5) that need to be managed.

## **Driving necessary change – Stop and Start Actions**

In a couple of hours, delegates took a 'mess' of issues and challenges raised from a representative sample of stakeholders (except for trade unions and MEC's) and worked collaboratively to understand how they formed a system of key interrelated variables that could now be measured and managed. This understanding enabled them, for the first time, to assess the quality of their own focus, efforts and behaviour in their areas of work and to think about how and where they needed to make changes. Some intentions were to:

- "Stop allocating vast amounts of energy into the wrong areas and start recognising the importance of the transitional variables (links)."
- "Stop moaning about the availability of resources and start developing school leadership management."
- "Stop thinking I don't have any influence on any of the variables and start supporting the School Management Teams (SMTs) which is a driver."
- "Stop expecting good results and pressurising teachers, when actually the problem is with the management of schools and start addressing issues from the bottom of the staircase (management). Work towards building an effective scorecard for schools."

## Biographies

### Julian Day

Julian specialises in facilitating organisational problem solving, complex projects and project crisis turnaround. He has developed practical action learning approaches to facilitate collaboration, group sense-making and sound intervention design in complex situations. He is committed to the growth and development of people so that they can manage the complexities of their work and lives creatively.

In 1982, after working for 5 years in the marine freight industry, Julian entered the field of Information Systems. He worked initially as programmer and later as systems analyst, systems designer, software process facilitator and project manager. He developed specialized knowledge of process and data modelling, system development methodologies and project management. In 1993 he began operating as an independent practitioner specialising in complex projects.

As his career progressed, Julian became increasingly involved in organisational problem solving, group facilitation, workshop design, training, creativity and organisational transformation. In particular, he grew concerned with the alarming failure rate of organisational projects, especially software projects. His research into the limitations of conventional project management and software methodologies culminated in PhD thesis that developed a framework for the “Design of Collaborative Projects”. He found that a chief cause of project failure stems from the inability of diverse people to collaborate intelligently in complex situations, and that when collaborations are well-designed, complex projects become manageable and tend to be successful. The principles and practice of complex project design are applicable outside the narrow sphere of Information Systems, and apply to most complex situations requiring intelligent intervention in organisational settings.

Julian has developed his project design framework into a practical methodology and used it successfully as a practitioner in projects across a wide spectrum of industry including oil, assurance, banking, auditing, asset management, transport, manufacturing, retail, executive training, advertising, software development, law, communications, tourism, cosmetics, NGOs and small business. Julian has also been developed a variety training workshops, mentoring programs and leadership development programs. Julian lectures regularly at University of Cape Town’s (UCT) Graduate School of Business and post-graduate programs at UCT. He has acted as academic director of various in-house leadership development programmes some of which are accredited by UCT and the National Qualification Framework. He lectures at the Gordon Institute of Business Science and University of Namibia on executive programmes.

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## **Rookan Podesta**

Rookan works with organisational leaders, managers, change agents and team builders who need to lead collaboratively in order to get things done, and who want to develop their team or group's ability to collaborate effectively.

Rookan uses a wide range of processes, practices, tools and techniques to help organisations integrate the distinct, but complimentary behaviours and processes of "action and learning" and "creativity and innovation". These include dialogue, appreciative inquiry, systemic competence mapping, design and systems thinking, organisational learning and impact analysis.

Clients he has worked with include the Amy Biehl Foundation Trust, ARK, Bonwit, Business Systems Group (Africa), Cape of Good Hope Bank, Daimler Chrysler, The Development Bank of South Africa, Dynamo/Citigate, Cape Town Tourism, DuFerco, Eskom, The Department of Education, EasyPay, Metropolitan, Nedcor, Nedlloyd P&Q, Oprah Winfrey Leadership School for Girls, Positive Muslims, RE/MAX, South African New Economics network, South African Ports Operations, SARS, Standard Bank, Sanlam, TIP (Teacher In-service Programme at UWC), The University of the Western Cape, TEXT100, The Red Cross Children's Hospital Trust, Transnet Freight Rail and Vodacom.

Before becoming an 'independent' organisational development consultant, facilitator and trainer in 2001, Rookan was a director at an IT consultancy, and also managed HR competency alignment at a regional bank.

His long-term partnerships include The Field Education with Dylan Wray of Shikaya and the 'Service Excellence Programme' with Cape Town Tourism.

In the educational sector Rookan's work has included the 'Building on Success' programme to develop Education Curriculum Advisors in South Africa; the co-founding of SACATS, the annual South African Curriculum Advisor and Teacher Support conference; Education Week, a national conference which now includes SACATS; and Education Conversations, a series of four interactive talks around the country in partnership with the DBSA and the Mail and Guardian. Rookan was also part of the facilitation team for the Dinokeng Senarios' Education Summit in 2010.

Rookan has lectured on business creativity and innovation at Cape Town's TSiBA University for 5 years, and has taken part in their formal mentorship programme for previously disadvantaged students.

Rookan has an Honours degree as part of an MBA from Stellenbosch Business School where he received the Masters' class prize for HR Strategy, and a Bachelor of Social Science in Industrial and Organisational Psychology from UCT.

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## **Dylan Wray**

Dylan Wray is the co-founder and Director of Shikaya, a non-profit organisation that supports the personal and professional development of teachers to create a South Africa in which young people in schools are inspired and supported to become responsible citizens and future in our democracy, valuing diversity, human rights and peace.

Shikaya offers teachers and department officials the following services:

- Professional development workshops and programmes
- Resources to support and enhance teaching and learning
- On-going personal support to teachers at their schools
- Support in the use of the Internet and other information and communication
- Technologies (ICTs) to extend and enrich teaching and learning
- Access to educational networks and research from around the world.

Dylan Set up and project-managed Shikaya's core project, *Facing the Past – Transforming our Future* which has worked with over 200 teachers from 65 schools across the Western Cape.

Dylan is also the co-founder of the South African Curriculum Advisor and Teacher Support conferences of 2007 and 2008 and of the 2009 Education Week.

Dylan has facilitated three online international Human Rights teaching courses for over 60 educators from over 30 countries across the world and has run courses for teachers in London and Colombia. He has developed numerous educational resources for the National Department of Education and the Western Cape Department of Education. He has also written History textbooks for MacMillan, New Africa Books and Juta Gariep Publishers.

Between 2002 and 2007 Dylan lectured to the pre-service History teachers from UCT Department of Education. The course began again in 2009 and was made compulsory for all of the pre-service High School teachers.

Dylan was previously the Head of History at Wynberg Girls' High School, Cape Town. He holds an Honours Degree in South African History and an HDE.

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