



Position statement – CAPS and Montessori Curriculum

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Choice in education

The right of parents to choose the type of education their children will receive is embedded in the United Nation's organization's Universal Declaration of Human Rights (Article 26), which states that:

(1) Everyone has the right to education. Education shall be free, at least in the elementary and fundamental stages. Elementary education shall be compulsory. Technical and professional education shall be made generally available and higher education shall be equally accessible to all on the basis of merit.

(2) Education shall be directed to the full development of the human personality and to the strengthening of respect for human rights and fundamental freedoms. It shall promote understanding, tolerance and friendship among all nations, racial or religious groups, and shall further the activities of the United Nations for the maintenance of peace.

(3) ***Parents have a prior right to choose the kind of education that shall be given to their children.***

Although South Africa is not a signatory to the Convention, the right to freedom of choice is recognized in Paragraph 29(3) of the Bill of Rights in the South African Constitution:

- 29(3) Everyone has the right to establish and maintain, at their own expense, independent educational institutions that
- a. do not discriminate on the basis of race;
 - b. are registered with the state; and
 - c. maintain standards that are not inferior to standards at comparable public educational institutions.

The right to open an independent school is governed by Chapter 5 of the South African Schools Act which specifies that:

45. Subject to this Act and any applicable provincial law, any person may, at his or her own cost, establish and maintain an independent school.

The assumption is that a person would only want to open "at his or her own cost" an independent school should he or she be wanting something different to what is offered by the state in public schools. The state is, however, obliged to ensure that children's rights to education are protected, and thus specifies certain requirements regarding what can be offered.

The Provincial head of department "must register an independent school if he or she is satisfied that-

- (a) the standards to be maintained by such school will not be inferior to the standards in comparable public schools;
- (b) the admission policy of the school does not discriminate on the grounds of race; and
- (c) the school complies with the grounds for registration contemplated in sub-section (2)."

Section 50 states: "(2) Different requirements may be made under subsection (1) in respect of different independent schools." This implies that there is a possibility for special provisions to be made to accommodate different categories of independent schools.

The right of independent schools to exist, and to offer types of education different from what is available in public schools is thus recognised in international agreements, the South African Constitution and in provincial legislation.

Rights and Responsibilities of Independent Schools

SAMA is a member of the National Association of Independent Schools. The Rights and Responsibilities of Independent Schools document underpins the relationship between the Department of Basic Education (DBE) and the National Alliance of Independent School Associations (NAISA) in 2008. This document, like the Communication Protocol, applies to the Provincial Education Departments (PEDs) as well.

“This document covers the key defining characteristics of independent schools. These are aspects of independent schools that make them different from public schools; both in the way they are legally sanctioned and the way they operate. These characteristics include the following:

- They follow their own distinctive missions (including particular ethos, faith or philosophy values);
- They determine their own learner admission policies in line with the law;
- They choose their own curricula and exit examinations that meet the prescribed outcomes of the National Curriculum Statement;
- They may determine their own promotion and retention policies in line with applicable policies;
- They determine how they are governed, financed and staffed, within the boundaries of the law; and in line with good governance practice.

The Rights and Responsibilities document asserts the rights of independent schools to operate within the confines of the Constitution and all relevant National and Provincial legislation. It also makes clear that “critical to their independence is the freedom of a school to use its professional judgement to make decisions. These key characteristics ensure that schools have the freedom they require to be able to determine and deliver programmes of academic excellence to learners.”

Regarding issues of curriculum and assessment, the document recognizes the legal position discussed in the previous section, that

Independent schools in South Africa must meet all learning outcomes and assessment standards prescribed in both the National Curriculum Statements for the General Education and Training (GET) and the Further Education and Training (FET) bands. Independent schools are free to choose their own curriculum and examinations as long as they meet the standards prescribed by the National Curriculum Statement. In choosing curricula, independent schools may pursue a particular philosophy or methodology like Waldorf, Montessori, ACE, etc. The majority of independent schools write public examinations while some choose the Independent Examinations Board examinations.

Independent schools, in addition, may also choose to write international examinations, such as the International Baccalaureate, the Cambridge examinations, O and A-levels from the United Kingdom or the Scholastic Aptitude test (SAT) from the United States, which do not fall under Umalusi’s control, but are approved by Higher Education South Africa (HESA) for admission to tertiary institutions in South Africa. (p.6-7)

Independent schools are also entitled to make their own decisions about promoting or retaining learners falling within the curriculum and assessment areas, as these are regarded as being “critical to a school’s freedom to use its professional judgement to maintain a high quality of education.”

The challenge in this regard relates to the understanding that the benchmark for standards to be attained is the “learning outcomes and assessment standards prescribed in both the National Curriculum Statements for the General Education and Training (GET) and the Further Education and Training (FET) bands.” (p7)

The National Curriculum and CAPS

Since 2002 (Grades R – 9) and 2004 (Grades 10 – 12) the outcomes specified in the National Curriculum have provided a fairly clear guideline to the minimum standards required, and these standards are assumed in references to standards in previous legislation and in the Rights and Responsibilities document.

In 2012 a number of amendments were promulgated which replaced the National Curriculum with a new set of requirements, commonly called CAPS.

The National Curriculum Statement Grades R – 12 (NCS) stipulates policy on curriculum and assessment in the schooling sector. To improve its implementation, the National Curriculum Statement was amended, with the amendments coming into effect in January 2012. A single comprehensive Curriculum and Assessment Policy document was developed for each subject to replace the old Subject Statements, Learning Programme Guidelines and Subject Assessment Guidelines in Grades R - 12. The amended National Curriculum Statement Grades R - 12: Curriculum and Assessment Policy (January 2012) replaces the National Curriculum Statement Grades R - 9 (2002) and the National Curriculum Statement Grades 10 - 12 (2004).

The National Curriculum Statement Grades R – 12 (January 2012) represents a policy statement for learning and teaching in South African schools and comprises the following: (i) Curriculum and Assessment Policy Statements for each approved school subject; (ii) The policy document, National policy pertaining to the programme and promotion requirements of the National Curriculum Statement Grades R – 12; and (iii) The policy document, National Protocol for Assessment Grades R – 12 (January 2012). (b) The National Curriculum Statement Grades R – 12 (January 2012) replaces the two current national curricula statements, namely the (i) Revised National Curriculum Statement Grades R - 9, Government Gazette No. 23406 of 31 May 2002, and (ii) National Curriculum Statement Grades 10 - 12 Government Gazettes, No. 25545 of 6 October 2003 and No. 27594 of 17 May 2005.

Whereas the previous versions of the National Curriculum were based on an outcomes/objectives model of curriculum design, clearly stating the intended criteria for assessment, CAPS focuses on content and methodology, with no clearly stated assessment measures.

The following appears in the first section of the various CAPS documents:

The policy document, National policy pertaining to the programme and promotion requirements of the National Curriculum Statement Grades R – 12, and the sections on the Curriculum and Assessment Policy as contemplated in Sections 2, 3 and 4 of this document constitute the norms and standards of the National Curriculum Statement Grades R – 12. It will therefore, in terms of section 6A of the South African Schools Act, 1996 (Act No. 84 of 1996,) form the basis for the Minister of Basic Education to determine minimum outcomes and standards, as well as the processes and procedures for the assessment of learner achievement to be applicable to public and independent schools.

Regulations pertaining to assessment in the context of the National Curriculum Statement Grades R – 12, promulgated in terms of the South African Schools Act (84/1996) were published in Government Gazette 28 December 2012, No 36041. These regulations pertain to “those independent schools offering the National Curriculum Statement Grades R – 12”. *This clearly implies that schools which do not offer the National Curriculum do not have to comply with these requirements.*

Reading these documents in conjunction it would appear that independent schools which do not implement the National Curriculum are not bound by the regulations pertaining to the National Curriculum but are nonetheless required to comply with the minimum outcomes and standards embodied in CAPS. CAPS, unlike the previous iterations of the National curriculum, is highly prescriptive regarding content, pacing and teaching methodology and but does not clearly define objective outcomes and standards.

While SAMA recognizes the rationale and context of the South African Curriculum and Assessment Policy Statement it asserts the rights of independent schools which choose to adopt alternative approaches to education to do so in a way which has been proven to yield the best outcomes for children. SAMA thus supports the position of other Montessori Associations internationally, as expressed by David Kahn:

It is not that national standards are without merit, but from the point of view of an alternative, holistic pedagogy, national assessment usually means an averaging, reductionistic mechanism which can measure only a small part of human development. Montessori outcomes are cognitive, moral, social, physical and emotional. Montessori pedagogy treats the child as a sensitive, whole person with developmental needs. Kahn, D., [Public School Montessorian National Standards? - Mixing Social, Political and Educational Issues](#).

Definition of Curriculum

The current national curriculum as embodied in CAPS does not contain a clear set of definitions for critical terms, assuming a common understanding of such constructs as “curriculum” and “assessment”. The word “curriculum” has multiple meanings.

“A curriculum may refer to a system, as in a national curriculum; an institution, as in the school curriculum; or even to an individual school, as in the school geography curriculum. Its four dimensions are: Aims or objectives, content or subject matter, methods or procedures, and evaluation and assessment” (Scott, 2008, *Critical essays on major curriculum theorists*, p. 19).

“An organized framework that delineates the content that children are to learn, the processes through which children achieve the indentified curricular goals, what teachers do to help children achieve these goals, and the context in which teaching and learning occur” (Bredenkamp and Rosegrant, 1995, p. 16).

The way in which the word is understood, and applied, is influenced by the beliefs, assumptions and world-view of each individual. This is confusing when trying to map the outcomes of one vision of curriculum against a curriculum framed within the context of what might be a very different set of beliefs. Generally curriculum theorists discuss curriculum in terms of explicit and implicit assumptions in relations to educative aims, a specific understanding of the construct of childhood (or of human nature in general for adult education), theories of learning (for example developmental or behavioural theories), teaching and its relationship to learning, knowledge (how is knowledge constructed, what knowledge is important) and ideas around the purpose and methods to be implemented for assessment and evaluation of the curriculum and of the recipients thereof. No one aspect of curriculum can be divorced from the others without impacting on the efficacy of the curriculum as a whole. (Carroll et al., 2007; O'Donnell, 2008)

The Montessori curriculum is the total programme, both explicit and implicit, adopted by a school with the intent of educating children. Thus a Montessori curriculum would encompass what A. V. Kelly (2009, p.9) calls the “overall rationale” for the educational programme. The Montessori curriculum is founded on specific beliefs and assumptions about children and learning which are not necessarily shared by the framers of the national curriculum. The Montessori curriculum is not simply a list of content to be covered, or outcomes to achieve, but conforms with the view taken by recent scholarly writings, which see curriculum as a complex and interwoven educational proposal, which represents a view of curriculum as “multi-dimensional and engaged in a dynamic interplay between practice, context and theory” (Connelly, 2008, p. xii).

The Montessori Curriculum

The Montessori curriculum is a holistic, integrated and systematic approach to learning. The content is chosen to meet developmental needs of children to enable them to grow into adults who are fully adapted to their own contexts. Content, methodology and philosophy cannot be separated. During training, Montessori teachers are educated in the full implantation of the curriculum.

The South African Montessori Association has adopted the Curriculum document drawn up by the Association Montessori Internationale as it's preferred Curriculum statement, as this has already been approved by the National Education Departments of various countries. While there is a standard Montessori curriculum that is used world-wide, the content of the curriculum is adapted so that children are exposed to the culture, history and country-specific content for their own contexts. SAMA adapted the AMI Montessori curriculum to include South African specific content.

Why the implementation of CAPS would impinge on the application of Montessori

Content & Sequencing

The Montessori Curriculum is developmentally based. This means that children are provided with opportunities to learn what they are ready to learn. Each child learns at his or her own unique pace and content is chosen which stimulates the child's interest and imagination, encouraging autonomous learning. Children thus become independent and self-directed learners.

CAPS specifies what content is taught and the exact sequence in which it must be taught. It assumes that students are all at the same level at the same time, and that the pre-chosen content and sequence is appropriate for all children. The Montessori classroom is designed to make individual learning not only possible, but optimal, recognizing that every child is a unique individual with his or her own needs and aptitudes which require individualized support.

Furthermore, the week-by-week sequencing of content assumes a linearity in learning which is not supported by research and which is not possible (indeed not desirable) in the Montessori classroom where peer teaching is encouraged by the way in which material is presented to individual children.

Any school following such a rigidly sequenced content would not be able to ethically claim to be Montessori, thus essentially offering something which it is not providing, and thus falling foul of the Consumer Protection Act. Parents who choose Montessori education for their children have a statutory right to that for which they have contracted the school to provide.

With reference to the content specifically, it is important to point out that the Montessori Curriculum is content rich, presenting interesting and challenging material including the full spectrum of natural and life-sciences, history and geography from the earliest levels. Literacy and numeracy are not an end in themselves in the foundation phase but rather a means to an end – the end is to enable the child to autonomously explore the wealth of human knowledge accumulated through the ages.

Children in a Montessori environment develop basic skills of literacy and numeracy in a sequence which is different to that followed in regular schools and achievement cannot be easily compared. A child assessed on conventional schooling standards may appear to be below the level of a child at the same age in a conventional school in some aspects (especially aspects

relating to rote-learning of decontextualized “facts”), but is likely to have mastered generalized concepts which do not even feature in grade-level assessments. This is because the Montessori Curriculum offers “big-picture” conceptual learning long before honing in on detail and requiring memorization of minutiae.

Thus the Montessori curriculum presents the child with unlimited possibilities for learning and development, which are nonetheless responsive to his or her own developmental needs.

The structure of this curriculum has been developed over a process of more than a century and its efficacy proven in almost every country in the world. To adapt it to meet the requirements of CAPS would be to strip it of its vibrancy and power to inspire, which is so essential, especially in early learning.

Separate Content According to Subjects or Disciplines

Although the Montessori scope and sequence is organised according to certain disciplines for content management purposes it is presented to the child as an integrated spiral of learning experiences. The concept of “indirect preparation” is critical. Essentially this implies that learning experiences provide the basis of future learning experience, and often learning in one area facilitates later learning in another area. Much of the indirect preparation cannot be evaluated until much later when the child integrates or constructs new understanding. This understanding of human learning is well supported by research in the constructivist tradition.

Particularly at the primary level, the curriculum is integrated, organic and holistic, responding to the developmental and personal interests and aptitudes of the individual child and of the group as a whole. Similarly the emphasis on numeracy and literacy as the focus of the Foundation Phase is the direct antithesis of the Montessori approach for that age group, which offers great stories and interwoven scenarios to inspire a sense of wonder and a life-long love of learning. Because Montessori does not use text-books and work-books exposure to content in the sciences and humanities is not dependent on literacy, and the use of auto-didactic teaching materials allows the exploration of mathematical constructs independent on rote-memorisation. Montessori assessment is thus more interested in how a child learns rather than on what he is learning at this early stage. The goal is to inspire a love of learning, rather than to impart specific content.

Non-Graded and Mixed-Age Structure of Montessori Schools

Montessori schools have non-graded mixed-age classes based on recognised developmental cycles. These cycles are congruent with the phases recognised by the South African education system. [Foundation Phase, Intermediate Phase, Senior Phase correspond with the Montessori 6 – 9; 9 – 12 and 12 – 15 groupings.] Authentic Montessori classes do not separate the children in these multi-age classes into grades. By not separating children by grades, a group dynamic develops that allows each child to work at his or her individual while both helping and receiving help from peers. There is an overwhelming body of evidence to prove the success of such mixed-age non-graded environments (Bennett, O’hare, & Lee, 1983; Combrink, 2011; Eichacker, 2008; Furman, Rahe, & Hartup, 1979; Graziano, French, Brownell, & Hartup, 1976; Hoffman, 2002; Irvin, McLaughlin, Irvin, & Doda, 1999; Kahn, 2003; Katz, 1990; Kripalani, 2010; Lemerise, 1997; Miller, 1991; Pavan, 1992; Tangen-Foster & Tangen-Foster, 1998; Theilheimer, 1993).

Dividing mixed-age classes into grades produces a multi-grade class, which is notoriously difficult to manage and which undermines the very strength of mixed groupings. For this reason grade-referenced content and outcome are not possible to implement in Montessori.

Time Allocation to Different Learning Areas – Notional Hours

The fragmentation of learning and notional hours envisaged in CAPS is not appropriate in the Montessori context. Generally Montessori classes work on long “work cycles” sometimes in excess of three hours, where children choose their own learning experiences, guided by the teacher. Because children tend to deep immersion and concentration, a child interested in a specific aspect will tend to work on that area exclusively for a period of time before moving onto something else.

Furthermore, not all children need the same amount of time to master the same content. While one child might need more time to master Mathematics, another may need additional time for reading. Yet another might require additional physical activity to promote optimal learning. This type of individualization is supported by the Montessori curriculum and environment. Because children work independently it is neither possible nor desirable to control the amount of time spent on different aspects of learning in an authentic Montessori environment.

Methodology

Montessori methodology is very specific. Montessori is a complete, complex and integrated educational model that has stood the test of time, withstood the scrutiny of scientific enquiry and has been successfully implemented in diverse countries and socio economic contexts. It is not a mix and match system that can be adapted to incorporate a smorgasbord of techniques for different subject areas willy-nilly, as would be the case were Montessori schools to begin to adapt to CAPS. One of the most important aspects of the methodology that conflicts with CAPS is that in Montessori instruction is pre-eminently individual whereas CAPS is based on the premise that most, if not all, instruction takes place in a group context.

To be successful, any educational approach must be integrated and cohesive. Montessori schools implement a curriculum that has its own content, sequencing, teaching and assessment methodologies founded on scientific principles of human development which have been practiced and fine-tuned in diverse contexts for over a century. It is an approach which has been validated through controlled studies. It is recognised and accepted around the world. To reduce the efficacy of a proven approach would not be in the best interests of the children whose parents have deliberately chosen this approach, in keeping with their recognized right to do so.

Assessment

The types of assessment, and related rigid stipulations regarding frequency are clearly inappropriate in the Montessori context. Children in Montessori are assessed regularly and systematically but non-intrusively. Assessment is individual and developmental, not norm- or criterion-referenced. Montessori assessment is integrated into instruction and is ongoing – often built into the materials with which the children work (Bachhuber, n.d.; Haines, 1995; Hennigan, 2008; Miller, 2009; Roemer, 1999).

The assessment methodologies stipulated in CAPS, most particularly the standardized tests, are not only inappropriate but may be counter-productive in the Montessori context. Furthermore, Montessori places a high value on developing skills of self-assessment and self-correction. Montessori teachers should never mark a child’s work, nor give marks or grades, as explicitly required by CAPS. Rather, the teacher notes the mistakes, and if the child does not notice the error himself, the teacher plans future learning experiences to help to correct the deficit in a way which does not undermine the child’s confidence and enthusiasm.

Montessori assessment is thus always developmental and formative, never summative. Imposing an assessment regime designed for an entirely different paradigm will serve no useful purpose in a Montessori context and will reduce the level of learning we would expect to see in a fully functioning Montessori environment.

Research supports classic Montessori implementation

Research supports the implementation of classic Montessori. Montessori education yields the best results when the approach is implemented with high fidelity – i.e. when all aspects of methodology and curriculum are applied together (Boehnlein, 1988, 1990; Danmore, Murray, Daoust, & Rabkin, 2010; Danmore et al., 2010; Danmore, 2004; Daux, 1989; Dawson, 1988; Dohrmann, 2003, 2003; Hughes, 2009; A. Lillard & Else-Quest, 2006, 2006; A. S. Lillard, 2005, 2012; Murray & Bagby, 2013; Murray, Daoust, & Epstein, 2012; Murray & Peyton, 2008; Murray, 2011; Rathunde, 2001, 2003)

Montessori High School

Currently there is no commonly agreed upon Montessori curriculum for Middle (ages 12 – 15) and High School levels. SAMA Member schools which offer High School currently write the Cambridge IGCSE, AS and A Level examinations which are recognized by HESA.

International Montessori Associations are currently working on a formalized curriculum for this level and SAMA would support the right of our schools to follow such a curriculum once it is published.

Conclusion

The South African Montessori Association calls upon the Department of Basic Education to support the spirit of the South African Constitution, the South African Schools Act and the provisions of the Rights and Responsibilities of Independent Schools document by allowing Montessori schools to follow the Montessori curriculum.