

CHAPTER ONE

1. INTRODUCTION, ORIENTATION, PROBLEM STATEMENT, RESEARCH PROGRAMME

1.1 INTRODUCTION

The dramatic political and social change cycle initiated by the election in April 1994 is by no means over. It is perhaps only now – when we are approaching the second democratic elections, that the impact of the country's transformation and its true economic and developmental needs are becoming apparent. Hence Mandela (Education Africa, 1997: Introduction) declared that:

"When South Africa's first ever democratic elections took place in 1994, it became a priority for the new government to transform education. The imbalances created by apartheid education demanded urgent and immediate correction, not only in the provision of resources and infrastructure, but also by restoring the culture of learning and teaching".

Education transformation has been given a Presidential Priority because the survival of the new dispensation depends on it. With this growing realisation of how deep the transformation still needs to be and the extent to which our economic potential has been under-utilised, come the awareness that the real challenge before us is how to manage these changes and developmental goals successfully.

As a result of the profound impact of transformation on education, education management is fraught with socio-economic challenges of an enormous scale. A monumental factor running through the socio-economic challenges is transformation of public service delivery as outlined in The White Paper on Transforming Public Service Delivery (Batho Petse White Paper), 1997. Central to this White Paper is acknowledgement and acceptance of the fact that there is a decline of service in the public service. The White Paper on Education and

Training 1995 explicitly states the necessity of improvement of education and training services. What comes as the crucial point in this paper is the realisation of the decline in the quality of performance in many schools. The dire need for quality is a direct challenge to education managers and their human workforce. Quality is required across the board. Managers should review their roles, teachers are expected to show certain competencies, and learners must show dedication and commitment. In addressing the quality issue in South African education and training, recognition of competence seem to be the appropriate strategy.

In this research project the researcher will attempt to develop new knowledge with regard to recognition of competence, empowerment and capacity building. Theories will be expanded through surveys and a way forward as regard the future will be envisioned through guidelines and recommendations. It is proper to declare from the onset that the purpose of this project is not to solve problems and test theories but to highlight problem situations, suggest means and ways of developing a new understanding towards a solution.

1.2 ORIENTATION

1.2.1 The context of the research

This research focuses on teachers. Therefore, research will be undertaken with a view to teachers sampled in primary and secondary schools – public schools. The survey will take place at the teacher's place of work. What must be noted is that this research does not entail a laboratory experiment. Research will be done on teachers' opinions, interests, attitudes, behaviour and policy practices and provisions, but not classroom activity per se. Nevertheless the researcher may refer to those activities of the classroom which have an impact on the variables mentioned above.

These variables do not completely require the natural environment such that the survey can be independently carried out of a specific context or environment. However, it is sometimes necessary to observe an individual reaction to a specific procedure or situation. In that case both contexts may be considered for the research.

1.2.2 Relating the study to Education Management

In order to concisely and precisely answer the relationship of this study to Education Management the researcher will first attempt to try to answer the question : What is Education Management? Definitions of Education Management abound in literature, but are developed from the general concept of Management such as those catalogued by Van der Westhuizen (1991:38-41).

- 1) Management is seen as achievement of objectives (Koontz and O'Donnell (1964), McFarland (1974), Trevatha & Newport (1976), Morgan (1976), etc.).
- 2) Management is regarded as a series of consecutive actions (De Wet, 1981).
- 3) Management is equated to decision-making (Robbins (1980), Lipham & Hoch (1974), Davis (1971), etc.)
- 4) Management is understood to be a process of co-ordination (Mahoney, 1961).
- 5) Other researchers refer to Management as leading and guiding (Reynders (1977), Van der Schroeffer (1968), Botes (1975), etc.)

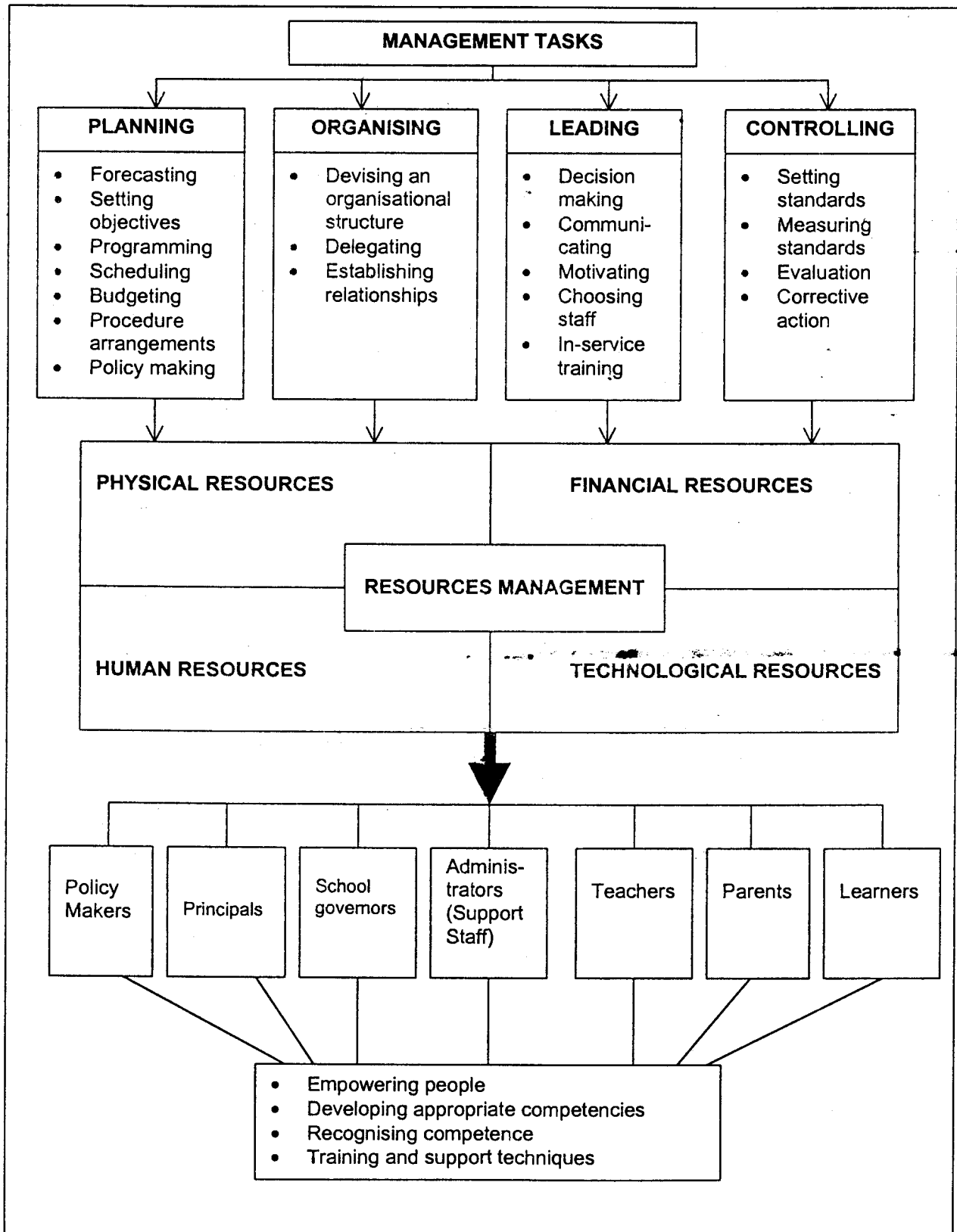
Marais and Bondesio in Garbers (1996:144-115) defined Management according to its components, functions and comparison to leadership. Van der Westhuizen (1991:55) defines education management as "a specific type of work in education which comprises those regulative tasks or actions executed by a person or body in a position of authority in a specific field or area of regulation, so as to allow formative education to take place".

When one looks at the above definitions the following implications come to light:

- That management is a specific kind of work in education.
- That education management is concerned with the "externa" of teaching and learning and thus makes effective teaching and learning possible.
- That management comprises a number of regulative tasks or actions.
- That management is brought into effect in a specific area of regulation.
- That authority is essential for good management.
- That management is a human act.
- That management is an interwoven act.
- That management takes place in relation to an organisation (Van der Westhuizen, 1991:55-56).

Furthermore, there is a need to enquire into the relationship of Education Management to Education. Van der Westhuizen (1991:56) declares succinctly that Education Management is a part-discipline of Education, and is an independent science. The definitions given above directly answer the question as whether this study – on recognition of competence – is a study in Education Management. The answer is demonstrated by the Figure below.

Figure 1.1: Recognition of Competence as an aspect of Education Management



This diagram demonstrate quite clearly that recognition of competence is part of education management. Recognition of competence develops from aspects of resources management which are derived from management tasks such as planning, organising, leading and controlling. These aspects of resources management (Physical, financial, technological and human) are operationalised into activities of empowerment, development, recognition and training. Several bodies or stakeholders are identified and the ones who engage in these management activities. Therefore, recognition of competence is part of human resources management in education.

1.2.3 Demarcation of the study

By demarcation the researcher refers to a means of establishing boundaries of the problem area. Demarcation will be done on all the variables that are intrinsically related to the problem and the more practical aspects which include the nature and scope of the literature study, number and subjects to be involved, research methods and duration of the research.

Demarcation of the study should be viewed as being complementary to the problem statement. They are not discrete processes diametrically unrelated. The researcher will focus on human resources management in education as the main field of research, but the specific field is human resources development. Research in this field will focus on recognition of competence, empowerment and capacity building in both public primary and secondary schools in the Northern Province of the Republic of South Africa. The area of research shall be demarcated further as it shall be shown in Chapter Four – into specific region(s) and whether urban or rural.

Research in this field is important, critical and crucial because public education is declared inefficient and ineffective. The paradox of this discourse is that the

government is trying its best to provide resources and yet there are schools with minimum or basic resources but performing excellently.

1.3 PROBLEM STATEMENT

The table below provides a clear picture of the state of teachers' competence according to qualifications. The problem to be investigated is whether the higher failure rate is caused by qualifications (underqualification) or resources.

Table 1.1: Educator qualifications by province, 1998

	Under qualified	%	Qualified	%	Total
Eastern Cape	20 800	31	47 023	69	67 823
Free State	7 502	31	16 581	69	24 083
Gauteng	5 504	13	38 495	87	43 999
KwaZulu-Natal	25 261	34	49 503	66	74 764
Mpumalanga	6 947	27	18 413	73	25 360
Northern Cape	1 412	21	5 463	79	6 875
Northern Province	12 210	21	44 889	79	57 099
North West	16 895	53	14 956	47	31 851
Western Cape	3 755	13	24 437	87	28 192
National	100 286	28	259 760	72	360 046

Source: Crouch, L. *More than you ever wanted to know about South African educator numbers: A Preliminary detailed analysis of PERSAL and enrolment records, August 1998.*

As a result of considering Table 1.1 a myriad of questions are raised. The following questions, which are components of the project on recognition of competence, empowerment, capacity building and retention of teachers, crystallises the problem of why such a higher failure rate exists when there is a higher proportion of qualified teachers in the Northern province.

- (i) What is recognition of competence?
- (ii) What are the aims and objectives of recognition of competence?
- (iii) What are the existing forms of recognition of competence and what are future prospects of improvement of recognition of competence?
- (iv) Which recognition programmes can be practicable in the demarcated area?
- (v) What is empowerment?
- (vi) Which empowerment programmes are relevant to recognition of competence?
- (vii) What is capacity building?
- (viii) What are the retention prospects of teachers?

1.4 AIMS AND OBJECTIVES OF THE RESEARCH

The researcher has distinguished between aims and objectives for clarity, precision and more insight. Aims are regarded as a broad and general intention of the research. Aims are derived from the main ideas and problems mentioned earlier. Because they are general and not specific the success of this project is illuminated by objectives.

Objectives are more precise statements of goals which guide planning of specific research units or outcomes. They are a series of short goals formulated in terms of the kind of recognition of the teacher's competence.

1.4.1 Aims

- (i) To investigate human resources management (HRM) aspects that influence the quality of service in public education.
- (ii) To identify measures that can assist teachers to realise their full potential and to help teachers enhance their professional development and career planning.
- (iii) To help analyse ways and means of ensuring that rewards, empowerment and capacity building match the teacher's needs and those of their schools.

1.4.2 Objectives

The following objectives can be realised through research:

- (i) To help managers establish informed decisions about recognition of teachers' competence.
- (ii) To investigate current practices with regard to recognition of competence.
- (iii) To inquire into ways of planning of human resources with a view to education transformation.
- (iv) To identify the strengths and weaknesses of the existing human resources management practices.
- (v) To probe into the relationship between recognition of competence and empowerment as well as capacity building.
- (vi) To identify programmes suitable for recognition, empowerment and capacity building.
- (vii) To outline the intricacies of teacher development and training, and retention of teachers.
- (viii) To help managers in understanding the need for quality in the public service.

1.5 RESEARCH METHODS

The researcher has adopted a two-pronged approach. The methods used are literature study and the empirical investigation. A literature study is employed to establish systematic views, assumptions, presuppositions and theories which will be used in analysing and interpreting the findings arrived at in the survey. The theories unravelled during the literature study will help in providing explanations and highlighting relationships between variables. Such views, assumptions and presuppositions will help in developing the model researched, and determining priorities for further research.

The internal validity of this research project will be based on literature that is available and catalogued in the bibliography. Primary sources such as Education Laws, letters, circulars, reports, magazines, journals, newspapers and dissertations will be used. The researcher will also collect data from tertiary sources such as dictionaries and encyclopaedia. Secondary sources will also be used. Crucial facts will be drawn from my supervisor.

These theoretical considerations will be elaborated further through the use of an empirical investigation. The survey will take the form of questionnaires distributed and interviews conducted in the Southern Region of the Northern Province.

1.6 CLARIFICATION OF CONCEPTS

Clarification of concepts will take a form of definitions. It is important to understand these definitions because they influence the whole orientation of the research. The definitions provided are constitutive definitions although some definitions may be termed operational definitions when unfolding the survey in Chapter Four. Constitutive definitions describe the essence of the phenomenon. Theoretical and abstract concepts related to the nature of the phenomenon are

used. Operational definitions take observable attributes and the manifestations of the phenomenon. They used to test results and statistics (Swanepoel & Mulder, 1978:17).

1.6.1 Recognition

Recognition can be defined according to the management dimension, transformation dimension and quality dimension. The definitions which focus on the transformation dimension are based on principles such as redress, life long learning, nation building and a new partnership between the state civil society and the individual. The transformation dimension considers that the current system of education

- lacks coherence and co-ordination;
- is poorly articulated;
- separates education and training;
- is characterised by adverse working conditions and a breakdown in the culture of learning, teaching and service and are reflected in poor morale, a poor work ethic and low professional self-esteem amongst many educators.
- an authoritarian management culture still pervades many institutions which accentuates race and gender inequality within education (Department of Education, 1998:8-9).

The Department of Education (1998:105) defines recognition as the granting of credit for segments of unit standards which are statements of the required learner capabilities that must be demonstrated. Unit standards are outcomes.

Recognition is equated to reinforcement or reward according to the management dimension. Van den Aardweg & Van den Aardweg (1988:193) define reinforcement as "a stimulus which follows a certain behaviour with the aim of perpetuating such a behaviour so that it is learned. Positive reinforcement is

reinforcement by means of a pleasant stimulus which encourages the repetition of the behaviour. Negative reinforcement is reinforcement by means of an unpleasant stimulus which discourages repetitive behaviour."

Rebore (1991:242-243) develops a definition by arguing that human beings ask a question such as: "What will I get out of this?" and further stated that "people act in ways that they perceive to be in their own best interests". Therefore rewards should be flexible to meet the expectations of individuals. Thus rewards can be in form of money, a promotion, certification, recognition of an employee's circumstances – internal and external, acceptance, praise, etc.

Blasé & Blasé (1994:103) regard recognition as motivation, a means to increase performance and job satisfaction of employees. Such quality dimension is summed up in the following statement:

"Our principal is very thoughtful and appreciative. She frequently writes notes of appreciation for specific things as well as simply to let me know that she is glad to be working with me. It is humbling, motivating, and encouraging knowing that your efforts have been noticed. I feel appreciated ... I work harder and I want to find new, better ways to do what I do."

1.6.2 Competence

There is no agreed definition of competence. Hyland (1992:23) corroborates this view when contending that "definitions of competence abound in the literature, and the term competence has different meanings to different people." Scientists look at a particular reality from different perspectives. As such there is a wide range of different conceptions in operation and a plethora of opinions about competence and its definition. The differences are reflected in the following definitions:

The initial broad definition was that it should "embrace the ability to apply skills, to perform a task, theoretical understanding of the task, and the ability to transfer knowledge, skills and understanding to another context". (Christie, 1995:2).

McLean (1995:23) holds the broad view of competence as that it should "include at least the knowledge and affective factors that underlie skills acquisition and sometimes also include experience and the ability to transfer competence to new contexts."

These broad definitions are followed by definitions related to specific contexts or aspects.

Bradley, Kallick & Regan (1991:101) define competence as the desired characteristics in leaders, it does not only refer to technical aspects, but may refer to the position the leader holds in the hierarchy of the school and how positive is the public on it.

Bridges & Kerry (1993:12) characterise competence as an ability to perform a task satisfactorily, the task being clearly defined and the criteria of success set out. Competence embraces intellectual, cognitive and attitudinal dimensions as well as performance.

Walting (1995) in Maile (1998:123) defines competence as skills that go with the job, and these skills are the ones that are key to the achievement of the objectives in the work purpose statement.

Saunders (1992) in Maile (1998:123) uses occupational context to define competence and regard it as the ability to perform the activity of an occupation according to the standards which are acceptable in employment.

A more comprehensive definition is given by McAleary & McAleer (1991:19): "Competence is a wide concept which embodies the ability to transfer skills and knowledge to new situations within the occupational area. It encompasses organisation and planning of work, innovation and coping with non-routine activities. It includes those qualities of personal effectiveness that are required in the workplace to deal with co-workers, managers and customers (students or parents).

And finally, competence may be referred to as the capacity for continuing performance within specified ranges and contexts resulting from the integration of a number of specific outcomes. The recognition of competence in this sense could be the award of a credit towards a qualification or the award of a qualification (Department of Education, 1998:103).

Blank (1982) in Maile (1998:123) and Calitz (1997:1) equate competence to concepts such as:

1. Outcomes-base education (OBE)
2. Performance-based education
3. Criterion-referred instruction (CRI)
4. Programmed instruction (PI)
5. Mastery Learning
6. Learning for Mastery (LFM)
7. Individualised Instruction (IT)
8. Self-paced Learning
9. Instructional System Development

1.6.3 Empowerment

The Concise Oxford Dictionary (1984) defines empowerment as the act of giving power to or making people able to do something.

Bolin (1989) in Blasé & Blasé (1994:2) define empowerment according to the manager's perspective as the act that

"requires investing in teachers the right to participate in the determination of school goals and policies and the right to exercise professional judgement about the content of the curriculum and means of instruction."

To teachers empowerment means

"the opportunity and confidence to act upon one's ideas and to influence the way one performs in one's profession. True empowerment leads to increased professionalism as teachers assume responsibility for and an involvement in the decision making process" (Melenyzer in Blase & Blase, 1994:3).

Keith & Girling (1991:38) unravelled the concept of empowerment and found that it has many uses and can be interpreted from different dimensions and perspectives. They defined empowerment as a means of installing structural changes that will increase satisfaction – flat as opposed to hierarchical structure, and power sharing to enhance self-identity and increase more productivity.

1.6.4 Model

Garbers (1996:16) defines a model as the body of propositions (factual statements, hypotheses, theories, laws, etc.) that, at a given time, is accepted by the scientific community as being valid and reasonably sound. A model is equated to scientific knowledge which is accepted or rejected on the basis of scientific research.

Van der Merwe (1996) in Garbers (1996:280) associated a model to a theory and defined it as

"... a set of interrelated constructs (concepts), definitions, and propositions that represents a systematic view of phenomena by specifying relations among variables, with the purpose of explaining and predicting the phenomena."

Its functions are to systematise and summarise existing knowledge, to clarify and give new meaning to theory, provides provisional explanation and stimulates generation of new knowledge by providing clues for further research.

1.6.5 Retention

The Concise Oxford Dictionary (1984) defines retention an act of retaining or to keep. In the context of this project retention means keeping teachers in the classroom. This definition can be developed further by outlining concepts with similar meanings such as teacher tenure, and those with antithetical meaning such as teacher layoffs, reduction, discharge and dismissal. There are other processes which oscillate between the two extremes such as rationalisation, redeployment, transfer and reassignment.

1.6.6 Excellent Teachers

Excellent teachers are teachers who perform better than others, have the highest qualities and are very good. This definition is vulnerable to subjectivity unless it is coupled with scientific criteria such as the definition given by Van den Aardweg & Van den Aardweg (1988:226):

"The better teacher is sincere, patient, flexible, a good disciplinarian, caring and helpful, has high expectations for his/her pupils, is friendly, fair, honest and consistent; she sees pupils as individuals, is enthusiastic and likes teaching, has good planning and organisation and is humorous and knowledgeable."

Vrey (1979:202-207) regards an excellent teacher as the one who sees himself positively – accepts himself as important, successful, esteemed, dignified, a person of integrity who is liked by others; does not self deceive himself, is frank and fair with minimum distortions and defensiveness; perceives and empathise with others in their circumstances and problems and is well informed.

In addition to the above Jones & Walters (1994:99-100) identify an excellent teacher as the one who exhibit instructional competencies such as:

- Understanding and implementing effective teaching methods.
- Being effective in science and technology instruction.
- Teaching higher level thinking and reasoning skills.
- Implementing mastery teaching.
- Being flexible and responsive to curriculum needs of the school.
- Use hands-on approach to classroom management.
- Put research based instructional skills into practice.

And an excellent teacher should also show personal qualities incompatible with quality service. Such teachers are:

- enthusiastic, positive and upbeat,
- have high expectations for students,
- believe all students can learn,
- are good role models,
- are skilled in behavioural management and assertive discipline,
- can respond to the needs of at risk students,

- can build self-esteem in students and use positive concepts,
- can work with minority and disadvantaged students,
- are aware of the changing family structures,
- are open to shared decision-making,
- are flexible and willing to learn,
- can work well in a team,
- are committed and loyal to the teaching profession,
- have high expectations and esteem for themselves as professionals,
- keep up with educational research and literature, and
- want to grow professionally (Jones & Walters, 1994:101).

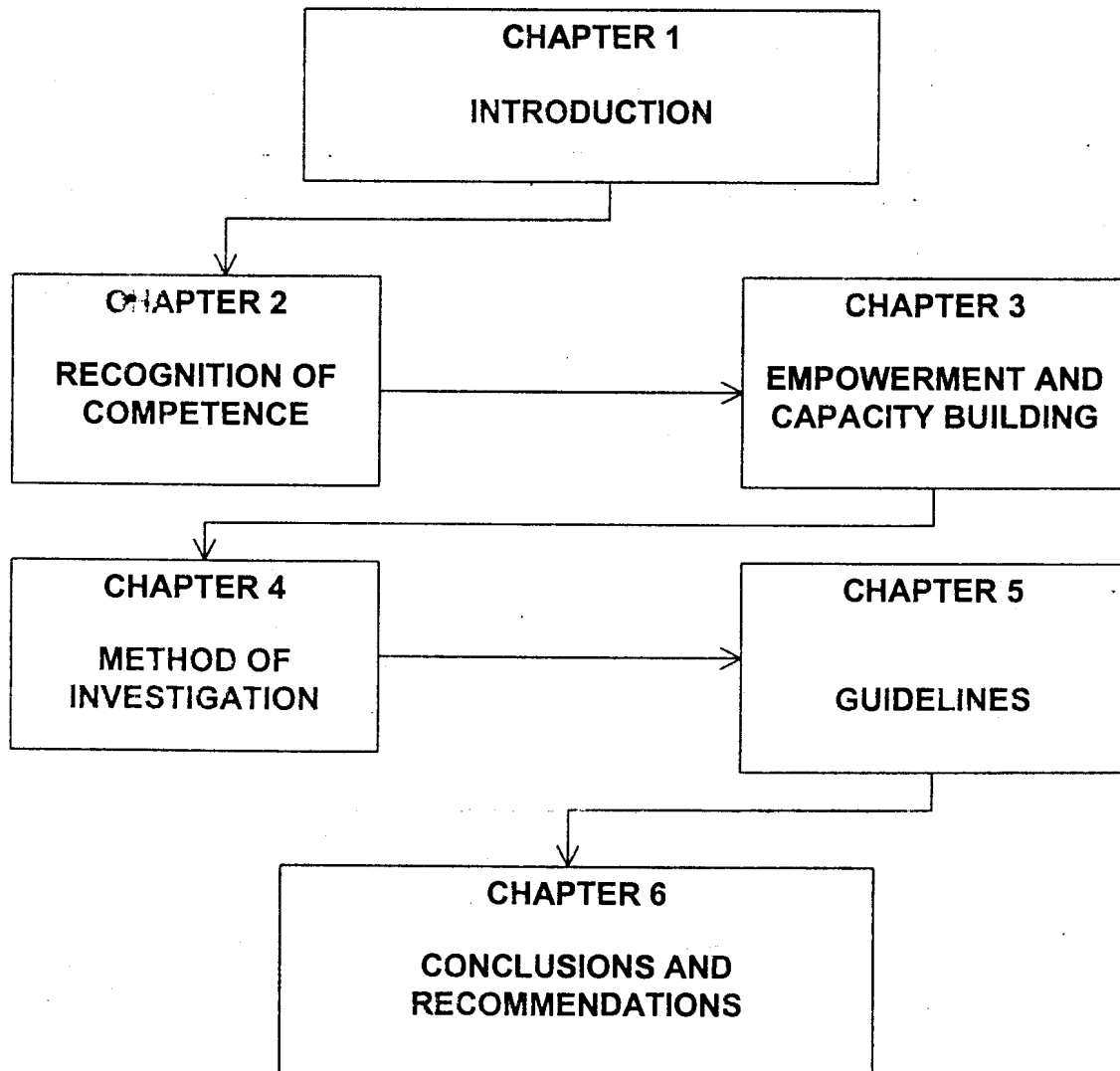
Of course, no individual would possess an equal measure all these personal qualities. An average excellent teacher would exhibit a minimum of these attributes.



1.7 RESEARCH PROGRAMME

The research programme can be delineated in the following diagram:

1.7.1 Flowchart of the research



1.7.2 Brief description of critical outcomes

1.7.2.1 CHAPTER ONE

- Introduction
- Orientation
- Problem statement
- Aims and objectives of the research
- Research Methods
- Clarification of concepts
- Research Programme
- Summary

1.7.2.2 CHAPTER TWO

- Introduction
- Recognition of Competence
- Recognition of Competence and Human Resources Management
- Rewarding and Valuing
- Pertinent Issues in the Recognition of Competence
- Organisational Management and Recognition of Competence
- Evaluation
- Conclusion

1.7.2.3 CHAPTER THREE

- Introduction
- Empowerment
- Objectives of Empowerment
- Assumptions to Empowerment
- Types of Empowerment
- Empowerment Aspects
- Capacity Building
- The legacy of Apartheid



- Capacity Building Objectives and Basic Requirements
- Approaches to Capacity Building
- Conclusion

1.7.2.4 CHAPTER FOUR

- Orientation
- Methodological Considerations
- Aims
- Research Methods
- Report on Interviews
- Findings from the survey

1.7.2.5 CHAPTER FIVE

- Introduction
- Discussion and Analysis of the Findings
- Guidelines
- Recognition of Competence
- Empowerment and Capacity Building
- Retention of Teachers
- Conclusion

1.7.2.6 CHAPTER SIX

- Overview
- Problem Solving
- Attainment of Aims and Objectives
- Conclusion
- Recommendations
- Limitations on the study
- Further Research
- Conclusion

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1.8 SUMMARY

The purpose of this chapter is to highlight the main issues involved in this project and to introduce the reader to items of the programme. It serves as a theoretical framework from which insight is enhanced with regard to recognition of competence, empowerment and capacity building as well as retention of teachers.

The model investigated should not be regarded as a once off and a rigid programme, but is a flexible and responsive programme. The specialised theoretical knowledge outlined in the chapters to follow should be viewed according to contexts relevant to each particular field. And finally, the programme does not claim to be an authority in Human Resource Management but merely develops and expands existing theories.

Chapter two attempts to unravel recognition of competence. Literature study reveal certain practices prevalent in the education system. Certain theories are debated according to human resource management perspectives. An attempt is made as to the relevancy of recognition of competence not only to education management but also to education transformation in general. Ways and means of recognising competence are investigated.

CHAPTER TWO

2. RECOGNITION OF COMPETENCE FOR THE RETENTION OF TEACHERS IN THE CLASSROOM

2.1 INTRODUCTION

At the heart of transformation in education is the need for quality. There are policy initiatives which are advanced to secure education quality goals and to identify future programmatic interventions which could stimulate education quality achievements for all schools. Hence the White Paper on Education and Training, 1995, advance that "The curriculum and teaching methods should encourage critical thinking, questioning and inquiry, and an understanding of the partial and incomplete nature of most human knowledge".

This postulation has far-reaching results and profound impact on education in general and education management in particular. Didactically, the consequence and influence is such that teachers and teaching would shift from an emphasis on content coverage to a focus on core competencies which learners need to demonstrate in different fields of study. Such a shift requires highly competent teachers. At the same time it requires "a competency-based approach to human resources management" (Neethling & Calitz, 1998:66). This paradigm shift develops from the fact that the previous education and training system separated education from training. By separating these two fundamental aspects of learning, the education system of the past did not meet the expectations of the country, as it did not prepare learners for life in South African society and the workplace.



A competency based approach to human resources management requires restructuring not only of learning but also of the way teachers are trained and developed. Teachers entering teaching should be able to exhibit outcomes that incorporate knowledge, skills, values, competencies and attitudes – which are distinguished into essential and specific outcomes. Hence Sergiovanni & Starrat (1993:135) assert that "All reward systems of the school should serve to promote academic achievement as the highest priority. Rewards for other desirable behaviour or achievement should be secondary to this priority".

Sergiovanni & Starrat (1993: 268-271) developed a framework for examining teaching competence. This frame focuses on conceptions of teachers and managers and is given in a table form. Technical competence refer to the teacher's ability, skills and expertise in carrying out routine classroom activities, to the manager or supervisor it embraces all management activities as outlined in figure 1.1. Further explanations can be referred to Table 2.1. Central to this notion are the principles of self-reliance, professional recovery, advancement of professional equality, sustainable development, motivation for total quality and democratic governance.

Recognition of competence considers the fact that people need to have or develop skills, knowledge, understanding and attitudes which enable them to carry out their responsibilities effectively. When viewed in the light of empowerment and capacity building, recognition of competence entail participative management, decentralised decision making, collaboration and teamwork. Recognition of competence therefore, tends to be developmental when considering the needs for teacher growth and development in raising the standards of public service delivery.



Table 2.1 Framework for Examining Four Types of Teaching Competence

	Technical Competence	Clinical Competence	Personal Competence	Critical Competence
Conception of the Teacher	Determines in advance what is to be learned, how it is to be learned and criteria by which success is to be measured.	Instructional problem solver; clinician frames and solves practical problems; takes reflective action; inquirer.	Understanding of self; self-actualised person who uses self as effective and humane instrument.	Rational, morally autonomous, socially conscious change agent.
Focus of supervision	Mastery of methods of instruction: specific skills (how to ask good questions); how to apply teaching strategies; how to select and organise curriculum content; how to structure the classroom for learning what techniques to use to maintain control.	Reflective decision making and action to solve practical problems (what should be done about disruptive behaviour) as well as reconsideration of intents and practices to take action to solve practical problems.	Increase self-awareness, identity formation, and interpretive capacities, e.g. self-confrontations, values clarification; inter-personal involvement; small group processes; develop personal style in teaching roles.	Reflective decision making and action to form more rational and just schools, critique of stereotypes/ideology, hidden curriculum authoritarian/missive relationships, equality of access, responsibilities, and forms of repressive social control.
Conception of the supervisor	Technical expert/master provides for skill development and efficient/ effective use of resources in class-room; translator of research theory into technical rules for application in classrooms.	Fosters inquiry regarding the relationship of theory and practice; fosters reflection about the relationship of intents and practice and reconsideration/ modification of intent/practice in light of evaluation of their conscience.	Expert in inter-personal competence and theories of human development; non-directive participants: Warm and supportive learning environment, responsiveness to teacher-defined needs and concerns, wisdom in guiding free exploration of teaching episodes, diagnosing theories-in-use.	Collaborator in self-reflective communities of practitioner-theorists committed to examining critically their own/ institutional practices and improving them in interests of nationality and social justice; provides challenges and support as do other participants in dialogue.

Adapted from: Zimpher & Howey in Segiovanni & Starrat, (1993:269).

It is against these postulations and developments in competency based education and training that the researcher intends to investigate recognition of competence, its relationship with human resources management, reward system and valuing, and a probe into issues pertinent to recognition of competence as well as its place in organisation management.

2.2 RECOGNITION OF COMPETENCE

2.2.0 Origin of competency-based approach

Recognition of competence, although recent in South Africa, has developed internationally as an aspect of human resources management. The researcher will unravel the origins of competency-based approach to management in the United States of America, the United Kingdom, New Zealand and South Africa.

(a) The United States of America (USA)

The competency movement has existed in the USA for the past 20 years, although there is evidence of its origins stretching back to the 1920's when the need developed for a 'more rational, cost-effective and practically useful curriculum' (Ashworth & Saxton, 1990:3).

There seems to be a general agreement that competence-based education is primarily derived from teacher education with later developments extending the idea to elementary schools, then to minimum competency standards for high schools and finally to vocational education.

The present interest in competence based education, which has arisen as a result of the emphasis it places on direct practical knowledge, is a response to two factors. These are: the increase in numbers and the diversity of prospective students, and societal demands for higher levels of competence. These in turn, were the result of concerns that still resonate in the modern day America (Calitz, 1997:2).

Briefly these are: the demand of increased and different kinds of competence; the pressure for more opportunities to gain competence and an attempt to arrest the perceived decline in standards (Ashworth & Saxton, 1990:4).

(b) The United Kingdom (UK)

In the United Kingdom (UK), the transition to a competence based system can be traced to various initiatives, in particular, the publication of a series of White Papers between 1981 and 1986.

Up until the Competency-Based Education and Training (CBET) had evoked little interest. There were two initiatives during the 1980's on which the political move towards change in education and training was premised.

The Royal Society of Arts was one of the first bodies to promote the notion of competence in the UK. Its schemes covered the spectrum from pre-vocational school-based to post-graduate level. In 1980 the Society identified four capacities which they considered to be under-emphasised in the education system. These capacities were : competence coping, creating and capability (Calitz, 1997:2).

By the mid 1980's most of the developments in competence-based learning had occurred in secondary and further education. Much of the debate during this period centred around defining competence and the standard used was from Further Education Unit for whom competence was: "the possession and development of sufficient skills, knowledge, appropriate attitudes and experience for successful performance in life roles". (Ashworth & Saxton, 1990:05).

(c) New Zealand

In 1990, New Zealand established a national qualification authority (the New Zealand Qualifications Authority) designed to establish a framework for all post compulsory qualifications. Soon afterwards, as required by statute, it set up a national qualifications framework which bore a remarkable similarity to those established in other countries such as the NCVQ in the UK (Calitz, 1997:3).

As with many other Western countries contemplating restructuring the education and training system, New Zealand embarked on this process because of rapid changes in the regional and global economic sphere, particularly Japan's phenomenal economic growth and the emergence of several other Asian countries as competitors.

(d) South Africa

Between 1990 and 1994, groups as diverse as the African National Congress (ANC), the Congress of South African Trade Unions (COSATU), the Private Sector Education Council (PRISEC) and even the National Party (NP) addressed themselves to policy alternatives for education reconstruction (Calitz, 1997:3).

In the process of policy making it was inevitable that old concepts would be rearticulated and new ones introduced. A new concept was that of CBET. According to Christie (1995) the insertion of CBET on the South African policy agenda indicated the extent to which groups like the ANC, COSATU and PRISEC had been influenced by the Australian debates.

Considering South Africa's past iniquitous Bantu education system, this emphasis on equity is desirable. Equally important, the White Paper on Education and Training (1995) conceives of education comprehensively and not merely in terms of schooling. The South African Qualifications Authority Act (Act No. 58 of 1995), calls for the establishment of a National Qualifications Framework (NQF) which is intended to: promote horizontal mobility between contexts, vertical mobility for all learners, credit accumulation and transfer and

also recognition of prior learning". (Christie, 1995:4). Such a system would have to offer different yet formally equivalent learning experiences in different learning contexts. It is within this context that the proposal for a competency-based system is located since it will offer flexibility in curriculum and assessment for different learners.

The international influence is apparent in the shift towards competence and an outcomes-based approach and this is also manifested in the notion of an integrated education and training system (Mahomed, 1996:16-17).

2.2.1 Components of Competence

Components of competence are varied and multifaceted depending on the perspective used. In Education Management components of competence embody nationally agreed and internationally comparable statements of outcomes and their associated performance criteria together with administrative and other necessary information. Such unit standards are registered on the National Qualifications Framework (NQF). The process of recognition requires managers to identify pertinent tasks, knowledge and/or skills within an occupation, profession, or trade and to establish the required achievement levels in performance of those tasks, but should not stifle individual innovation and creativity.

Rebore (1991:73) identifies the statements of segments of unit standards to be demonstrated by teachers as capacities for continuing performance within specified ranges and contexts as:

- (a) self-esteem
- (b) self-efficiency
- (c) knowledge and skills such as
 - instructional skills
 - management skills
 - human relations
 - leadership skills
 - self-understanding

- (d) political awareness
- (e) cultural awareness
- (f) social participation
- (g) rights, duties and responsibilities
- (h) resources

It is expected of education managers to define the work to be done, develop position guides and determine qualifications of each position (job analysis); to plan for the recruitment of quality personnel and secure the disadvantage in accordance with affirmative action requirements (recruitment); to place personnel in position of their strengths; make flexible assignments (placement); to match individual employees with positions (selection); to provide orientation, develop mentor programmes, and plan further training needs (induction and training); to plan for promotion, demotion, transfer, dismissal and provide for academic freedom (Tenure). All these human resources functions should be developed into outcomes (Jones & Walters, 1994:17).

The organisation of human resources functions into outcomes entails establishing a structural organisation from which the school system may be managed, and provide assistance in setting the planning framework for personnel. Competency-based approach to human resources specifies two types of outcomes. Essential outcomes and specific outcomes.

Essential outcomes are cross-curricular, broad general outcomes that endorse learning and teaching. In relation to this, specific outcomes represent contextual, perceptible knowledge, skills and values that reflect the essential outcomes.

Human resources management outcomes are subject to a procedure by which the school management gives formal recognition that a teacher is competent in terms of a specific purpose (Accreditation). It does not require the national or provincial authority to recognise the teacher's competence. School principals, as immediate managers, have the competence and are delegated to recognise teachers' competence in their immediate locality. And the principals can recommend to the higher authorities. The outcomes to be recognised should be

clearly stated and may include outcomes that are compulsory for learning required for a particular qualification (core) and those that are a selection of additional credits at a specified level to ensure that the purpose of the qualification is achieved (elective). Table 2.2 suggests a wide range of competencies which can be recognised contextually according the positions on the NQF where national unit standards are registered and/or qualifications awarded. These levels are arranged to signal increasing complexity in learning and to facilitate meaningful progression routes along career and learning pathways.

Table 2.2 Teacher competencies

<ul style="list-style-type: none"> • Adaptability • Commitment • Communication • Compliance • Control • Creativity • Decision-making • Delegation • Development of others • Energy • Enthusiasm • Flexibility • Impact • Independence • Initiative • Instructional command • Integrity • Interaction 	<ul style="list-style-type: none"> • Judgement • Leadership • Listening • Monitoring • Motivation • Negotiation • Organising • Persuasiveness • Planning • Presentation • Problem solving • Reflective • Resilience • Sensitivity • Team building • Tenacity • Tolerance • Vision
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Source: Maile, (1998:125)

In conclusion, it must be noted that these outcomes incorporate knowledge, skills, values, competencies and attitudes. This outcomes based approach in regard to human resources management and development represents a paradigm shift and provides broad guidelines within which each teacher training programme can develop its own curriculum according to the expected competencies.

2.2.2 Objectives for the Recognition of Competence

Recognition of competence as a model for the introduction of a service delivery programme cannot be achieved in isolation from other fundamental management changes within the public service. It must be part of a fundamental and broader shift which regards productivity as its primary goal. Improved public education service delivery cannot be implemented by issuing circulars only. It is a dynamic process which is developed from section 195 of the Constitution of the Republic of South Africa (Act No 108 of 1996) which outline public service delivery principles as

- a high standard of professional ethics be promoted and maintained;
- services be provided impartially, fairly, equitably and without bias;
- resources be utilised efficiently, economically and effectively;
- responding to people's needs;
- it be accountable, transparent and development oriented.

As a result of the consideration of this principles, the following objectives are formulated.

1. Extension of knowledge.
2. Consolidation and reaffirmation of knowledge.
3. Continual acquisition of knowledge.
4. Familiarisation with curricular developments.
5. Acquaintance with psychological development.
6. Introduction of new methods.
7. Understanding cultural revolution.

8. Familiarity with changes in local and national policy as well as global trends (Mohlakwana, 1996:23).

Furthermore, it is the objective of recognition of competence model to

- give career protection for disadvantaged groups;
- make training systems more responsive to education's immediate skills needs;
- redress inequalities inflicted under apartheid;
- engage the teaching corps in lifelong learning;
- make nation building a reality;
- and harness critical contributions of all stakeholders in education.

2.2.3 National Qualifications Framework (NQF)

2.2.3.1 Definition and Orientation

National Qualifications Framework (NQF) cannot be defined in isolation from socio-economic developments in the country and in education. Section 2.2(d) of this chapter has tried to account for the historical development of NQF. According to South African Qualifications Authority Act, 1995 NQF means the National Qualifications Framework approved by the Minister of Education for the registration of national standards and qualifications.

It provides learning opportunities for learners regardless of age, circumstances, gender and level of education and training. It allows learners to learn on an on-going basis. This is called life-long learning and is central to the NQF. The NQF integrates education and training by enabling learners to move from one place of learning to another. It recognises formal and informal learning. It promotes 'the sandwich' approach to education by allowing learners to move between education and working environments. Credits and qualifications are easily transferable from one learning situation to another. It addresses needs of learners and the community (Department of Education, 1997:5).

Olivier (1998:4) asserts that NQF is a means of recognising competence as it "registers all types of learning achievements within one of the eight levels. The NQF will embody all registered unit standards, credits, qualifications in such a manner that the interrelationship will enhance and facilitate career pathing, portability, articulation and flexibility between economic sectors".

NQF is crucial to human resources management in education as it gives formal recognition of the achievement of the required number and range of credits and such other requirements at specific levels as may be determined by relevant bodies registered for such purpose by the South African Qualifications Authority. Recognition in this regard is guaranteed if it meets requirements as expressed in registered statements of desired education and training outcomes and their associated assessment criteria. Learner's competence is accommodated at various levels as shown in Table 2.3

Table 2.3 : Proposed structure for an NQF

NQF Level	Band	Types of Qualifications and Certificates		Locations of Learning for units and qualifications		
8	HIGHER EDUCATION AND TRAINING BAND	Doctorates Further Research Degrees		Tertiary / Research / Professional Institutions		
7		Higher Degrees Professional Qualifications		Tertiary / Research / Professional Institutions		
6		First Degrees Higher Diplomas		Universities / Technikons / Colleges / Private / Professional Institutions / Workplace / etc.		
5		Diplomas, Occupational Certificates		Universities / Technikons / Colleges / Private / Professional Institutions / Workplace / etc.		
Further Education and Training Certificates						
4	FURTHER EDUCATION AND TRAINING BAND	School/College/ Training Certificates Mix of units from all		Formal high schools/ Private/ State schools	Tech- nical/ Commu- nity/ Police/ Nursing/ Private Colleges	RDP and Labour Market schemes/ Industry Training Boards/ Union/ Work-place, etc.
3		School/College/ Training Certificates Mix of units from all				
2		School/College/ Training Certificates Mix of units from all				
General Education and Training Certificates = 4						
	GENERAL EDUCATION AND TRAINING BAND	Senior Phase	ABET Level 4	Formal high schools/ Private/ State schools	Occupation/ Work-based training/ RDP/ Labour Market schemes/ Upliftment programmes/ Community programmes	NGO's/ churches/ Night schools/ ABET programmes/ Private providers/ Industry training boards/ Unions/ Workplace, etc.
		Intermediate Phase	ABET Level 3			
		Foundation Phase	ABET Level 2			
			ABET Level 1			
		Pre-school				

Source: Department of Education, (1996:48a)

NQF can be clearly explained and understood in the following objectives:

- To create an integrated national framework for learning achievements;
- To facilitate access to, and mobility and progression within education, training and career paths;
- To enhance the quality of education and training;
- To accelerate the redress of past unfair discrimination in education, training and employment opportunities ; and thereby
- Contribute to the full personal development of each learner and the social and economic development of the nation at large.

Although the above objectives try to answer the question as why the NQF in the education system, the following factors are also emphatic of the need for the NQF in social transformation and economic development, and to make South Africa competitive.

(a) Inefficiencies of South Africa's Education System

In recent years South African public education system has been put under scrutiny as a result of higher failure rate. What comes out to be crucial in ameliorating the system is education management development. Despite the pockets of excellence and innovation in management, it is crucial that recognition of competence be taken as a priority in management development in order to overcome the following problems:

- A lack of coherence and co-ordination.
- Poorly articulated programmes.
- Separate education and training tracks.
- Weak linkages with industries.
- The legacy of apartheid.
- Organisational ethos and the culture of learning, teaching and service.
- And a distorted labour market (Department of Education, 1998:8-9).

All of these indicators suggest a crisis of major proportions. A national qualifications framework is required to correct distortions of the past in qualifications and standards. NQF will help in meeting needs of the society and will lay foundations for a successful society and economy in the globally competitive conditions of the 21st century. This kind of transformation entails harnessing contributions from various stakeholders and bodies in facilitating change.

(b) Changing Social Demands

The new dispensation brings fundamental social change which impact on human resources management. These changes place new demands upon schools, centred on the themes of redress, lifelong learning, nation building and the creation of a new relationship between education and training.

The National Qualifications Framework should, according to Van der Horst & McDonald (1997:74), aim at reconstructing the current education and training systems into a system which reflects an integrated approach which addresses learners' needs effectively. It means that recognition of competence will be influenced by staff representivity, student access, staff development programmes, capacity building and the rebuilding of disadvantaged institutions.

The transformation imperative of the NQF requires accommodation of new as well as traditional learners. These trends are in keeping with experience in other parts of the world, where demographic, social, cultural and economic pressures have led to a shift from 'closed' to 'open' education and training systems.

(c) New Economic Realities

The NQF is indispensable to the economic future of the country, both in its immediate relationship to work and in its role developing teachers. These roles are profoundly affected, first, by the moral and social imperative to meet the basic needs of the nation, and second, by changes in the local and global economics.

The most significant challenge is globalisation. Nel in Garbers (1996:38-43) unravelled this concept and discovered it to be manifested in internationalisation which can be described as the 'ease with which the world's best competitors enter almost any market at any time. It entails interinvolvement of events and players in the world arena as a matter of acknowledging that the events, happening in a range of different social contexts will influence the activities and processes in our own. Globalisation is a means of homogenisation whereby societies would not be seen as systems in an environment of other systems, but as subsystems of the larger inclusive world society.

Globalisation refers to important changes presently taking place largely in social and economic sectors of the advanced economies. Because there is intensification of world-wide relations which link distant localities in such a way that local happenings are shaped by events occurring many miles away, it implies that South Africa should re-engineer her education system to mobilise all productive factors such as labour, capital, organisation, technology, and new materials. It is through well defined levels of competence that South Africa can enter internationalisation which requires well defined levels of competence for the development of a culture of homogeneous global knowledge. The National Qualifications Framework will ensure South Africa's interconnectedness and transnationality.

Globalisation as a phenomenon impacts primarily on quality, especially quality public education. In recent years the quality of public education has been contracting. This decline stands in sharp contrasts to the growth jobs in the public education sector. Education and training and employment strategies need to adapt to these important shifts. Globalisation has also affected skills of teachers. Automation and technological innovations entails replacing existing skills with new – which may often lead to unemployment (Department of Education, 1998:13). In a developing economy like South Africa globalisation has the potential of raising general skills and education and training levels required by teachers in the formal education. This is a reality when one considers the introduction of Outcomes Base Education in South Africa.

(d) Responsiveness to Diversity

The development of National Qualifications Framework (NQF) entails a change in the education system. Education management theories and models are also destined to change. The implementation of an outcomes-based approach to education and training, and the shifts in learning and teaching frameworks from content-driven to programme-oriented models have a huge impact on human resources management.

It is for this reason that the Department of Education (1998:15) envisions a new qualifications structure. This structure will be based on a more flexible combination of fundamental, core and elective learning credits with the aim of linking education and training, theory and practice, and head, hand and heart more closely together. The structure will offer greater breadth, in terms of mathematical and communicative literacy, in terms of core and elective learning, to work and career development.

Responsiveness to diversity and integration of education and training is actualised through institutional co-operation. Such initiatives will expose teachers to a range of learning options which cut across the traditional divisions between academic and vocational learning, and between college-based and workplace experience. There will be a greater link between pre-service and in-service education and training.

(e) The Demand for Quality

The NQF not only provides framework for qualifications and standards in terms essential (critical) and specific outcomes based on assessment criteria for a particular competence, but it expresses the demand for quality in the public education service. The implementation of NQF ushers in a new public service management whose essence is to

- assign individual managers with the responsibility for delivering specific results for a specified level and for obtaining value for money;

- manage institutions according to the principles enshrined in the Constitution of the RSA, 1996 (Section 195).

According to Steyn (1996:120) the focus on providing quality is not new. What is new is the approach used to achieve it. The approach used to achieve quality is Total Quality Management (TQM). TQM is a philosophy and a model which can be used in managing recognition of competence. Arcaro (1995:6-7) assure managers that TQM "can help education professionals cope with today's changing environment. It can be used to alleviate fear and increase trust in schools. TQM can be used as a tool to establish an alliance between education, business, and government. Education alliances ensure that the school's professionals are provided with the necessary resources to develop quality education programs ... It establishes a flexible infrastructure that can quickly respond to society's changing demands".

The quality movement's demands are congenial to the objectives of NQF. Quality in education is guided by consultation, service standards, access, courtesy, accurate information, openness and transparency, redress and value for money. TQM approach also emphasises the acceptance and pursuit of continuous improvement by means of improvement tools.

National Qualifications Framework will ensure that a holistic approach is used in human resources management in that it follows an integrated approach to education and training which links one level of learning to another and enables successful learners to progress higher levels of recognition without restriction, from any starting point in the education and training system. And it motivates teachers because learning and skills which teachers have acquired through experience and on-site training or self-education could be formally assessed and credited towards certificates, in order to enable them to qualify for entry to additional education and/or training (Department of Education, 1996:19).

2.2.3.2 Career Progression and Qualifications

According to the Department of Education (1997:17) career progression and portability of qualifications depend to a larger extent on the mechanisms of articulation between providers and institutional discretion. There are four levels of statutory provisions regulating articulation within the higher education sector:

- (i) Acts of Parliament, which are applicable to all forms of inter-institutional articulation;
- (ii) the Joint Statute of the Universities, which is applicable to articulation between universities and to articulation from other institutions (e.g. technikons) to universities;
- (iii) the Joint Statute of Technikons, which is applicable to articulation between technikons and to articulation from other institutions to technikons.

These provisions are focused to a large extent on periods of attendance at the universities or technikons conferring degrees or diplomas; acquisition of a particular number of credits at these institutions; acceptance of certificates of competence in instructional offerings issued by another university, technikon or institution; and in the case of articulation from diplomas to degrees, acquired conditional or full matriculation exemption.

The statutory arrangements pertaining to articulation make recognition element – acceptance of attendance, prior learning and recognition of credits for added knowledge and skills – optional, not compulsory. Finally, what must be noted is that the extent of actual recognition remains the prerogative of governing bodies of universities, technikons and colleges of education, and depends on the attitude of each institution. Table 2.4 provides a general picture of the programmes currently offered in the teacher education sector.



Table 2.4 Teacher education offered by institutions

COLLEGES OF EDUCATION	UNIVERSITIES
<p>Two-year Certificate in Education (9 credits) pre-primary phase junior primary phase senior primary phase</p> <p>Three-year Diploma in Education (9 credits) pre-primary phase junior primary phase senior primary phase secondary phase</p> <p>Four-year Higher Diploma in Education (14 credits) pre-primary phase junior primary phase senior primary phase secondary phase</p> <p>One-year Higher Diploma in Education (5 credits) pre-primary phase junior primary phase senior primary phase secondary phase</p> <p>Further Diploma in Education (5 credits) Specialisation</p>	<p>Three-year Diploma for the secondary phase (9 credits)</p> <p>Four-year Higher Diploma (14 credits)</p> <p>One-year Higher Diploma in Education (postgraduate)</p> <p>Composite degree (four years) (15 credits) e.g. Bachelor of Arts in Education</p> <p>Bachelor of Primary Education (5 credits)</p> <p>Postgraduate Degrees Bachelor of Education Master's degree Doctor's degree</p>
<p>Technical Colleges</p> <p>N3, N4, N5, N6 Certificates together with a completed apprentice/trade Certificate</p> <p>Three-year National Diploma</p>	<p>Other qualifications</p> <p>Licentiate and Diploma in Education Certificates and Diplomas in Dancing and Ballet National Diploma in Hotel Management Diploma in Nursing Higher Diploma in Library Science Three and Four-year Diplomas in Social Work Three-year Diplomas and four-year Degrees in Therapy</p>
<p>Technikons</p> <p>Three-year National Diploma in Education (9 credits)</p> <p>One-year National Higher Diploma in Education (5 credits)</p> <p>Four-year BTech in Education Degree</p> <p>M Tech/Master's Diploma</p> <p>D Tech: Education</p>	

Source: Mataboge & Loots in Department of Education, (1997:19).

The Education Labour Relations Council (ELRC) (1997:4-6) provides that recognition of the educator's competence, expressed in qualifications, is based on Relative Education Qualification Value (REQV). The determination of the REQV of an educator's qualifications is based primarily on the number of recognised full-time professional or academic years of study at an approved university, technikon or college of education, taking into account the level of school education attained. Table 2.5 illustrates REQV structure.

Table 2.5: REQV Structure

REQV	EDUCATIONAL QUALIFICATION
10	Grade 12 or lower without a teacher's qualification
11	Grade 8, 9, 10 or 11 plus a teacher's qualification of at least two years apposite training
12	Grade 12 plus one year or two years apposite training
13	Grade 12 plus three years apposite training
14	Grade 12 plus four years apposite training
15	Grade 12 plus five years apposite training
16	Grade 12 plus six years apposite training. Only professionally qualified educators can be classified under REQV 16, provided such persons are in possession of a recognised completed university degree
17	Grade 12 plus seven years apposite training. To have REQV of 17 a persons must, in addition to the requirements for classification under REQV 16, also be in possession of at least a recognised master's degree

Source: ELRC (1997: 4-5)

The ELRC (1997:6) provides that further qualifications may be recognised if an educator improves his or her qualifications his or her REQV improves. With the implementation of NQF recognition teachers' competencies stretched to include informal teacher education activities such as publishing in professional journals,

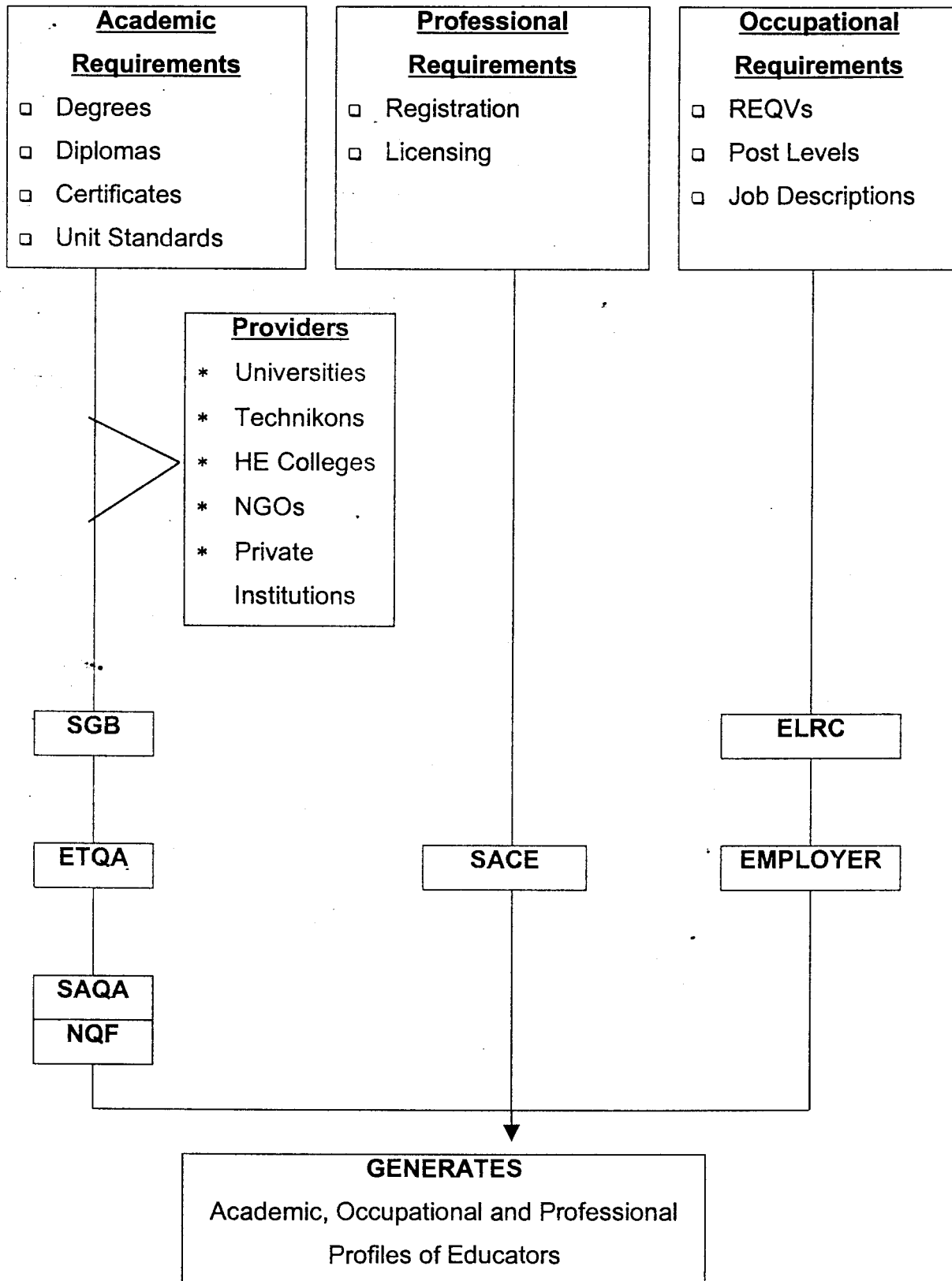
attending workshops, conferences and subject association meetings, involvement in curriculum development or course material writing, or acting in senior post (Department of Education, 1997 : 126).

2.2.3.3 A new approach to Norms and Standards

The transformation of the education system is fraught with challenges. For example, retrospective considerations point out that the present norms and standards do not regulate the accreditation of providers, do not assure the quality of programmes, nor do they articulate with professional requirements. And they do not articulate academic, professional and occupational requirements in a systemic manner. As a result of these weaknesses, the present norms and standards do little to contribute to continuing development of professional teachers.

The Department of Education (1997:27) suggests a new norms and standards which should be understood as being constituted by requirements for academic qualification, for professional qualification and for occupational qualification. In order to become a qualified professional educator, a person must fulfil the necessary academic, professional and occupational requirements. In order to be, and to practise as, a qualified professional educator, a person must become a lifelong learner who is continually learning about and improving his/her academic, occupational and professional practices. In other words, the norms and standards for teacher education should not only regulate pre-service requirements, but should also regulate in-service requirements that are aimed at the continuing development of teachers. Figure 2.1 shows how these requirements are linked.

Figure 2.1 Linking academic, professional and occupational requirements



2.2.3.4 The levels, bands and fields of the NQF

The NQF consists of eight levels providing for General, Further and Higher Education and Training bands. For further classification refer to Table 2.3. Olivier (1998:5) posits that the education and training bands can be seen as broad containers of the NQF accommodating qualification on the various levels. Levels 1 and 8 are regarded as open-ended to respectively accommodate low level entrants and do away with any kind of ceiling at the highest level. The contents of what will be devised within the NQF are social constructs, as they are developed in close alliance with the partners involved.

The levels and bands serve as an empowerment model to help recognise teacher's competence. The main responsibility of the NQF is to deal with the calibration of qualifications, credits and unit standards in order to build a framework, which adheres to the following:

- (a) Integration of education and training;
- (b) Relevance of education and training as means to achieve other ends and not to be pursued as ends in themselves;
- (c) Credibility for industry, service sectors and institutionalised providers of learning;
- (d) Coherence and flexibility for moving within and through levels;
- (e) Standards for education and training expressed in terms of outcomes;
- (f) Access to appropriate levels of education and training for all prospective learners;
- (g) Articulation between and within education and training to provide for learners to move between components of the delivery system.
- (h) Progression which should permit the progress of learners through the levels of national qualifications via different combinations of the components of the delivery system;
- (i) Portability which should provide for learners to transfer credits or qualifications from one learning institution or employer to another; and

- (j) Recognition of prior learning obtained through formal, non-formal and informal learning and/or experience (Olivier, 1998:6-7; Department of Education, 1996:21-22).

This research project revolves around competence of teachers, as such it focuses on the higher education band. Competence, in terms of the Higher Education and Training band, should be regarded as comprising of a wide range of credits embodied in a coherent number of unit standards supported by evidence of achievement of outcomes and range of credits and other requirements, as may be determined, at a specific level the NQF. Recognition can be given to a planned combination of learning outcomes which has a defined purpose(s), and which is intended to provide qualifying learners with applied competence and a basis for further learning. Thus, recognition should add significant value to the qualifying learner in terms of enrichment of the person, provision of status, recognition, credentials and licensing, enhancement of marketability and employability, opening up of access routes to additional education and training (Olivier, 1998:9).

Consequently, the recognition provided by NQF will

- allow for the achievement of both quality and relevance across the education and training system to ensure cross fertilisation between theory and application, and to ensure effective technology transfer;
- enhance access to, and flexibility of, options for learners;
- increase awareness of career opportunities;
- increase awareness and information on educational opportunities, learning processes and forms of delivery;
- assure stakeholders of the quality and value of programmes and qualifications;
- increase portability of qualifications; and
- increase emphasis on better performance and continuing development (Department of Education, 1996:61).

The NQF also provide for diversity of competence. This diversity is expressed in form of fields. Fields are a key part of the organisational mechanism of the NQF. They are in a sense both the habitat within which standards are generated, as well as the organisational level at which coherence of qualifications is regulated. Fields are organising tools for the NQF. The fields may be clustered around discipline bases which form the ultimate basis for all competence – knowledge, skills and attitudes, or may be clustered around occupational areas. Table 2.6 indicates the fields as suggested by the Department of Education (1996:35).

Table 2.6: NQF Fields

01	Agriculture and Nature Conservation
02	Culture/Arts
03	Business, Commerce and Management Studies
04	Communication Studies and Language
05	Education, Training and Development
06	Engineering and Technology
07	Human and Social Studies
08	Law, Military Science and Security
09	Manufacturing
10	Medical Science, Health, and Social Services
11	Physical, Mathematical, Computer, and Life Sciences
12	Utility Services
13	Planning and Construction

Source: Department of Education (1996:35)

2.2.3.5 Governing the NQF

SAQA regulations constitute four distinct bodies to govern the National Qualifications Framework :

(a) The South African Qualifications Authority (SAQA)

SAQA has ultimate authority and responsibility for and over the NQF. The NQF is subsidiary to SAQA. The mission of SAQA is to ensure the development and implementation of the National Qualifications Framework. SAQA sets standards of educational outcomes (Van der Horst & McDonald, 1997:74). The NQF as a body serving under SAQA has the following functions:

- (i) To see that education and training be brought together.
- (ii) Learning is recognised whether it takes place in formal or informal settings.
- (iii) Learners are able to move between education and working environments.
- (iv) Areas of learning are connected to each other to enable learners to build on what they learn as they move from one learning situation to another.
- (v) Credits and qualifications are easily transferable from one learning situation to another.
- (vi) Needs of the learner and the nation are addressed and met.
- (vii) Qualifications obtained by learners are recognised and accepted nationally and internationally (Department of Education, 1997:5).

These functions of the NQF are an expression of the following objectives of the NQF:

- (i) To create an integrated national framework for learning achievements;
- (ii) To facilitate access to, and mobility and progression within education, training and career paths;
- (iii) To enhance the quality of education and training;
- (iv) To accelerate the redress of past unfair discrimination in education, training and employment opportunities; and thereby
- (v) Contribute to the full personal development of each learner and the social and economic development of the nation at large (Department of Education, 1997:35; Olivier, 1998:6).

The functions of SAQA are in essence to

- (i) oversee the development of the NQF;
- (ii) formulate and publish policies and criteria for
 - registration of bodies responsible for establishing education and training standards;
 - the accreditation of bodies responsible for monitoring and auditing achievements in terms of standards and qualifications;
- (iii) oversee the implementation of NQF, including
 - the accreditation of bodies responsible for moderating and auditing achievements and the assignment of functions to them;
 - the registration of national standards and qualifications;
 - ensuring compliance with the provisions for registration and accreditation; and
 - ensuring international comparability of registered standards and registered qualifications.
- (iv) advise the Minister of Education and Labour on registration of standards and qualifications; and
- (v) be responsible for the finances of SAQA.

SAQA oversees the constitution, accreditation, development and financing of National Standards Bodies (NSBs), the Education and Training Qualifications Authorities (ETQAs) and Standards Generating Bodies (SGBs).

(b) National Standards Bodies (NSBs)

National Standards Bodies (NSBs) are responsible for the registration of qualifications on the NQF. According to the SAQA Act, 1995 each field of the NQF will be brought under one NSB. The NSB will be composed of six categories of organisations such as:

- State departments;
- Organised business;
- Organised labour;
- Providers of education and training;
- Critical interest groups; and
- Community/learner organisations.

The functions of the NSBs, as delegated by SAQA are:

- (i) To define and recommend to SAQA the boundaries of the discrete field for which it is constituted;
- (ii) To define and recommend to SAQA a framework of sub-fields to be used as a guide for the recognition and/or establishment of SGBs;
- (iii) To recognise and/or establish SGBs within the framework of subfields or withdraw or rescind such recognition or establishment;
- (iv) To ensure that the SGBs meets the SAQA requirements for the registration of unit standards and qualifications;
- (v) To recommend the registration of unit standards on the NQF to SAQA;
- (vi) To recommend qualifications to SAQA;
- (vii) To define requirements and mechanisms of moderation to be applied across ETQAs;

- (viii) To update and review qualifications;
 - (ix) To liaise with ETQAs regarding the procedures for recommending new standards and qualifications, or amending registered standards and qualifications;
 - (x) To appoint office bearers for committees and members of committees as required to carry out the functions designated, in consultation with SAQA; and
 - (xi) To perform other functions as may from time to time be delegated by SAQA (Olivier, 1998 : 11-12; Department of Education, 1997 : 35-36).
- (c) The Education and Training Qualifications Authorities

The Education and Training Qualifications Authorities (ETQAs) accredit providers, certify learners (a power which can be devolved) and ensure that the quality of programmes meets the standards specified in the registration of the qualification. ETQAs will operate in specific sectors or sub-systems and over specified levels (Department of Education, 1997 : 36). According to Olivier (1998:13) SAQA accredit ETQAs to oversee the implementation and maintenance of the system by delegating ETQAs to address the problem of invariable standards of learning provision and maintaining of assessment standards for registered unit standards.

ETQAs could be established on the basis of:

- social sectors;
- economic sectors; and
- education and training subsectors.

The functions of the ETQAs are to ensure:

- (i) the accreditation of constituent providers;
 - (ii) the promotion of quality amongst constituent providers;
 - (iii) the monitoring of provision by constituent providers;
 - (iv) the evaluation of assessment and facilitation of moderation among constituent providers;
 - (v) the registration of constituent assessors for specified NQF standards and/or qualifications in terms of the criteria established for this purpose;
 - (vi) taking responsibility for the certification of constituent learners;
 - (vii) co-operation with the relevant body or bodies appointed to moderate across ETQAs;
 - (viii) the recommendation of new standards and qualifications to NSBs for consideration, or the recommendation of modifications to existing NQF standards or qualifications to NSBs for consideration;
 - (ix) the maintenance of a data base acceptable to SAQA;
 - (x) the submission of reports to SAQA in accordance with SAQA requirements; and
- (d) Standards Generating Bodies (SGBs)

The SGBs are established to perform the following functions:

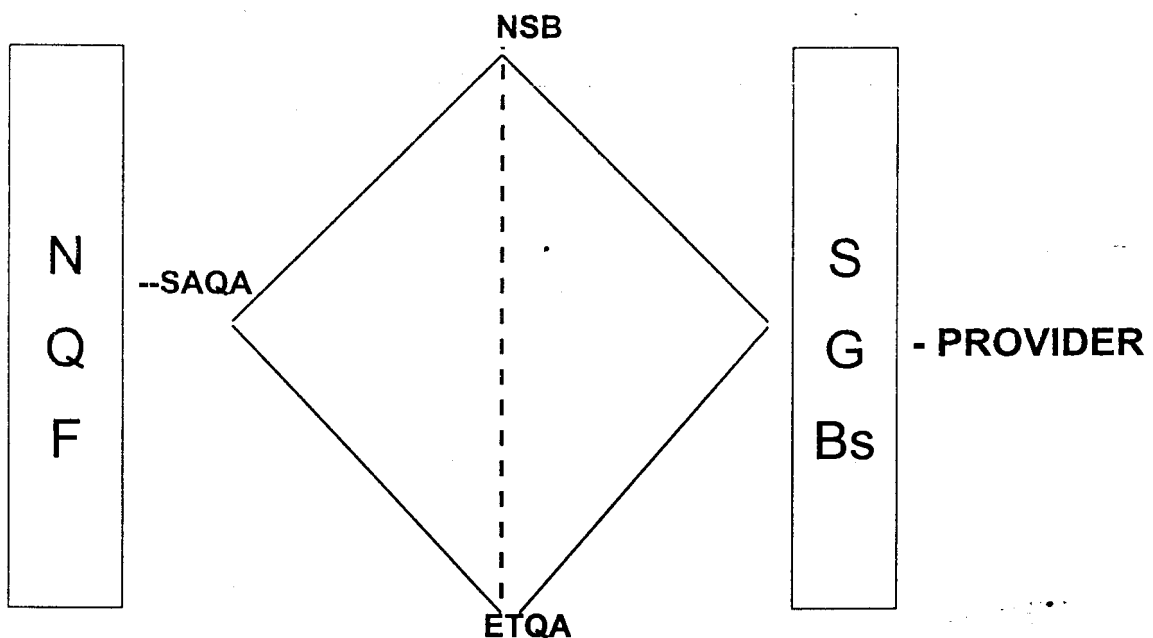
- (i) generate unit standards and qualifications in accordance with SAQA requirements in identified sub-fields and levels;
- (ii) update and review standards;
- (iii) recommend unit standards and qualifications to NSBs; and
- (iv) other functions as may from time to time be delegated by SAQA.

The bodies which form the SGBs include plenary and expert groups and stakeholders within a sub-field. When developing unit standards and qualifications, SGBs have the following overarching functions:

- (i) assess the broad impact of their field of concern on all the levels of the framework;
- (ii) limit duplication of unit standards and qualifications across all the areas of learning;
- (iii) consult with stakeholders;
- (iv) ensure that the needs of the beneficiaries of the education and training are met;
- (v) promote transferability of skills;
- (vi) accommodate changes in areas such as technology; and
- (vii) set and maintain standards, whilst focusing on quality, effective and efficient provision of education and training by providers (Olivier, 1998:12).

Finally, it must be noted that National Qualifications Framework bodies – SAQA, NSBs, ETQAs and SGBs – are related and complementary to each other. This is demonstrated by the figure below.

Figure 2.2: Bodies responsible for academic qualifications



2.3 RECOGNITION OF COMPETENCE AND HUMAN RESOURCES MANAGEMENT

2.3.3 Educational Challenges

As South Africa emerges from the years of struggle against apartheid, its people face the challenge of transforming a society weakened and corrupted by misrule, mismanagement and exploitation into a vibrant and successful democracy. Transformation involves every aspect of life. Major steps are being taken to transform systems and structures. Hence the Task Team on Education Management Development (Department of Education, 1996:11) finds that

"the task of transformation is greater than reconstructing the systems and structures which sustain any society. It requires a fundamental shift in attitudes, in the way people relate to each other and their environment, and in the way resources are deployed to achieve society's goals".

The transformation imperative lies in a series of policy initiatives which chart a way forward for change in education. Transformation policies are intended at improving the quality of teaching and learning. Department of Education (1998:8-9) identified the following problems that characterise the current system:

- (i) A lack of coherence and co-ordination;
- (ii) A lack of funding coherence;
- (iii) Poorly articulated problems;
- (iv) Differentiation between education and training;
- (v) Weak linkages with industry;
- (vi) The legacy of apartheid;
- (vii) Organisational ethos and the culture of learning, teaching service; and
- (viii) A distorted labour market.

Davidoff & Lazarus (1997:1-10) unravelled the issue of change and transformation and found that both are premised on three different contexts. First is the global context. At this level change is occurring at an ever-increasing pace. The above problems arise as a result of globalisation. The challenge

facing educational managers is to ensure that educators skills, knowledge and attitudes are articulated according to the rapid changing world economy.

Secondly, there is the national context. Because South Africa has shifted from apartheid to a democracy, there is a need to change the education system as well. Overhauling the education system is only possible if there is harmony between the vision for transformation and the day to day realities of those working in the system. The task of transformation seems to be a serious challenge when considering Davidoff & Lazarus's (1997:2) argument:

"We have been crippled by apartheid and our reconstruction out of ashes of human degradation is needing more than we ever realised : more courage, more resources, more hard work, more tenacity. Many people have lost faith clearly, our struggle is not yet over, although it takes new forms which require new understandings. We stand at a threshold, with a sense of endless possibilities, with a vision of the unfolding of a young democracy respecting and supporting human rights of every citizen. For many people, we stand at the precipice of chaos and certainty, where future possibilities seem far less glorious than the past has been".

The challenge is to overcome "human degradation", to jerk up systems and structures so that they are geared towards human resources development and to maintain and sustain quality of education transformation programmes. Hence the National Qualifications Framework aims at reconstructing and developing the education and training systems into a system which reflect the transformation imperative, to provide educational opportunities and to sustain quality (Van der Horst & McDonald, 1997:74).

Thirdly, transformation is filtered through the local context. Schools exist within particular community contexts. These contexts are part of what shapes the school and gives it its identity. It is in the same spirit that Michael Sadler (in Dekker & Van Schalkwyk, 1989:3) concurs that:

"we should not forget that the things outside the schools matter even more than the things inside".

As such, global, national and local community contexts impact on the school. The school is where educational policy is put into practice. Educational policy needs to be developed in such a way that teachers have a supportive framework within they can participate actively in processes of change and development. Policy needs to address real needs experienced by teachers and schools. The school is at the heart of educational change. It is therefore needs to be equipped to manage such change effectively, so that it can become a learning organisation which recognises the competence of teachers.

Recognition of competence as a challenge at school level can be overcome if the following challenges are overcome:

- overcrowded classes;
- lack of physical resources;
- lack of a culture of teaching and learning;
- low teacher morale;
- discipline problems with teachers and learners;
- cliques on the staff;
- division and mistrust between management and general staff;
- lack of vision;
- general mistrust and conflict among staff members;
- lack of accountability;
- high absentee rate of teachers and students;
- no staff development;
- lack of parental involvement in the school;
- lack of access to available physical resources;
- gender, age, language and race issues;
- authorisation, top-down leadership style;
- no appraisal or evaluation taking place;
- 'old style' approach to teaching and learning; and
- lack of professionalism at school (Davidoff & Lazarus, 1997:52).

When seen, viewed and interpreted holistically these challenges can be summarised as:

- Economic reconstruction;
- Political reforms;
- Changing educational realities; and
- The learning society (NCHE, 1996:51-66).

These challenges are founded on the following principles which guide the restructuring of the current education and training system:

- Redress and/or equity;
- Democratisation;
- Academic freedom and institutional autonomy; and
- Effectiveness and efficiency.

2.3.2 Competency-based Approach to Recruitment and Selection

Recognition of competence should be the focus of human resources managers right from the beginning when an educator is recruited and selected to fill up a position in the organisation. In order to meet the quality demand in the public service, appointment of staff should be based on quality recruitment and selection. According to Maile (1998:95-94) a competency approach to recruitment and selection is manifested in personnel planning which, essentially, involves looking ahead to the future staffing needs and planning accordingly. This does not mean that the job and the organisation should be glamorised to secure the applicant's interest (Clardy, 1996:42). The problem arise then of what is competency-based approach to recruitment and selection?

The Sowetan (1999:26) defines competency-based approach as the culturally fair way to identify potential and ensure that candidates are judged by their behaviour patterns and intrinsic skills and competencies. It is an approach whereby each position is redefined according to actual skills that can be measured for performance. This requires that recruitment and selection officer rewrite job

specifications and look carefully at how each task will be assessed and judged. It means that recruitment and selection can be more specific and also enable recruitment officers to widen the search to find people from different backgrounds who have transferable skills. This approach ensures that the right candidate is placed at the right job. Rebore (1991:102) cautions recruitment officers that:

"no one person will possess all the characteristics to their fullest extent, not all characteristics have equal importance in determining who is the best candidate".

Therefore, a competency-approach to recruitment and selection should include remedies in case of shortage of skill in a candidate. Coaching, mentoring and induction are part of this approach. This stops organisations trying to poach the 'one and only' available person and builds capacity and enhances quality within the organisation, on the one hand. On the other hand, it precludes individual recruits from job-hopping or moving from one job to the other because one is not supported in the job. It also makes companies rethink their automatic requirements of 'must have experience in the job' or must have an academic qualification. Like any other method of recruitment and selection this method does not promise the 'thou holier than' other methods. Its weakness is the fact that candidates themselves are not able to assess their competencies and still think in terms of education and job titles. Furthermore, a standard instrument to measure performance is yet to be developed in education.

A competency-based approach aims at making selection more effective. According to the Open University (1988:59) recruitment and selection can be made effective by considering two dimensions: the technical management aspects where concepts of prediction, reliability, validity, effectiveness, efficiency, developed abilities and latent ability are invoked, and the micropolitical management aspects. Technocratic ends are not pursued in a vacuum but often have to take account of a complex web of human and power relationships. This micropolitical dimension can be particularly challenging to the technical requirements of good selection practice in educational settings. In order to make the micropolitical aspects, selection should be regarded as act of prediction and not a blind gamble. It should have the intention of predicting as accurately as

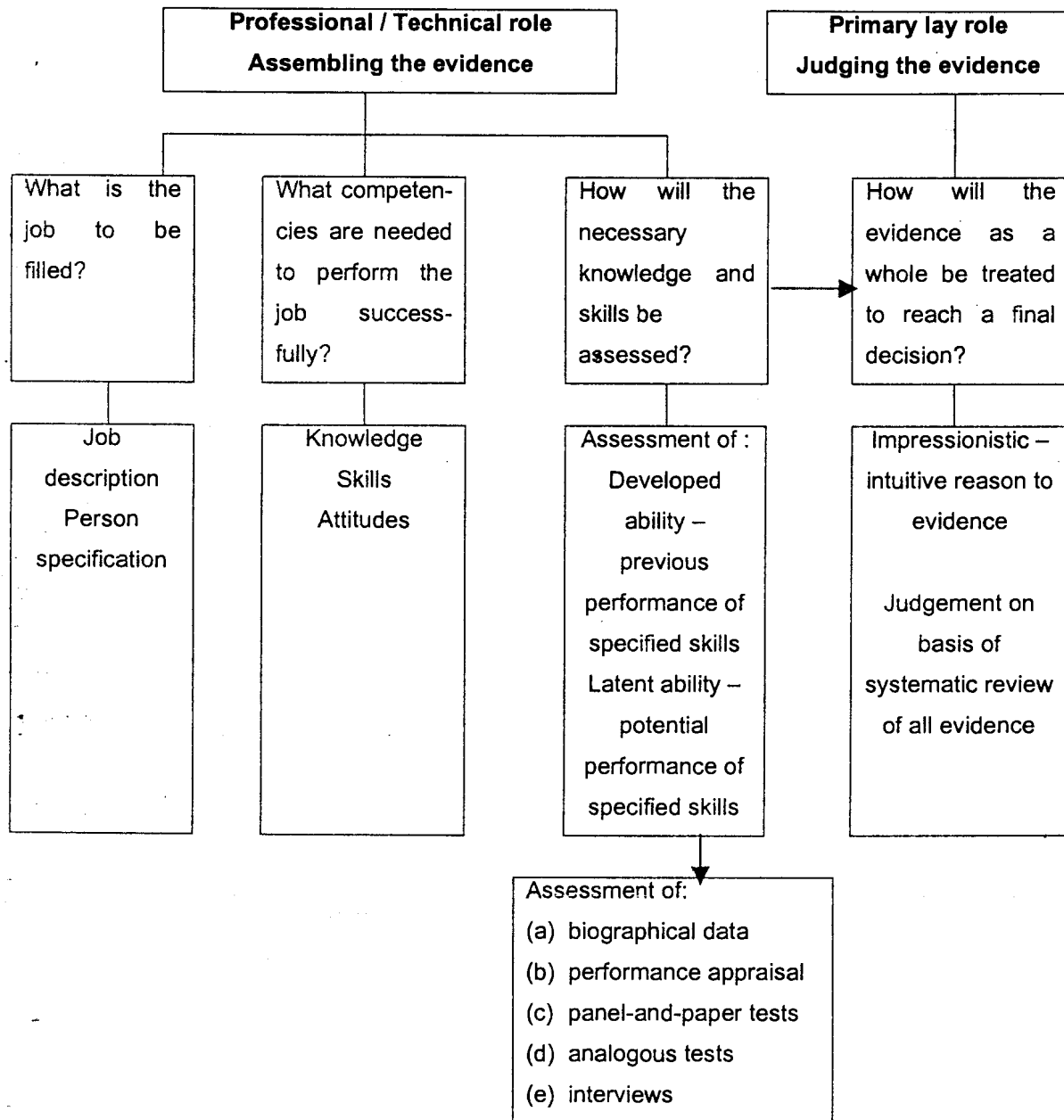
possible that a person can perform a certain job. In this way, elements of chance are eliminated by the progressive accumulation of evidence tied to job performance.

The Open University (1988:60) provides that rational selection procedures that are linked to job performance can be achieved by carrying out the following four steps:

- (i) The job to be filled is clearly defined and understood by the selectors, i.e. there is a good and clear job description.
- (ii) The competencies to perform the job successfully are explicit, i.e. the job criteria or person specification have been prepared and are known by the selectors.
- (iii) There is a planned provision for the assessment of all the required competencies, i.e. the technical assessment stages have been clearly conceived and scheduled.
- (iv) There is a clear policy on how the final decision is to be arrived at and the final stage procedure ensures that all of the evidence of earlier stages is accumulated and considered before making a judgement.

The figure below summarises this model of recruitment and selection. The competency approach to recruitment and selection should be viewed holistically in relation to job analysis and staffing needs. This approach is premised on globalisation needs whereby recruitment and selection is made flexible to meet demands made by new education and training paradigm. The new competitive environment requires the entire labour force to be sufficiently skilled to adapt to highly unpredictable and volatile global market and rapid technological change. At national context this model is relevant as it seems to address issues of redress, representivity, equity, capacity building and staff development. Educators are called to be committed to lifelong learning and nation building (Department of Education, 1998:11).

Figure 2.3: A competency-based model of recruitment and selection



Source: Open University (1988:72)

2.3.3 Job Analysis and Staffing Needs

Job analysis is a term used for describing the process of identifying jobs and determining their content. It is concerned with tasks, duties and responsibilities to be executed in each job (position). Job analysis also addresses the context (working conditions) in which the job is lodged, and it determines the required

skills and characteristics to be possessed by the jobholder (Jones & Walters, 1994:51-52).

The product of a job analysis is expressed in written job descriptions and job specifications. The job description describes the content of a job in terms of tasks to be performed, specific responsibilities, and work conditions. The job specifications refer to the qualifications needed to perform the job. The enumeration of requisite skills is typically amplified by the listing of educational and experiential credentials deemed to indicate the possession of those skills by the job incumbent.

According to Emmerson & Goddard (1993:72) the process of job analysis which is geared towards recognition of competence begins with a clear definition of the job in unambiguous terms. This is in a way concurring to Jones & Walters (1994:52)'s aversion that job analysis as a way of recognising competence entails listing and identifying skills, knowledge and attitudes required by a particular job. This process cover areas such as:

- (1) Job title.
- (2) Classification and code.
- (3) General description of the job.
- (4) Major responsibilities and duties.
- (5) Additional assignments (e.g. extra curricular duties).
- (6) Organisational relationships.
 - (a) Position to whom the incumbent is responsible.
 - (b) Positions supervised, if any.
 - (c) Communication lines and relationship to other positions.
- (7) Working conditions.
 - (a) Workload.
 - (b) Working hours and work year.
 - (c) Compensation level.
- (8) Evaluation criteria and performance standards.

- (9) Qualifications.
- (a) Educational level.
 - (b) Professional certification
 - (c) Professional and related experience.
 - (d) Specific skills, knowledge and abilities.

The process of job analysis may seem to be simple and easy at face value, but it is a complex exercise which requires consultation with relevant stakeholders such as education specialist, school governing bodies and, to a certain extent, organised teacher bodies and learners' structures. Management aspects of the school should be considered as well. These include aspects such as the vision, mission, curricular needs of the school, specific circumstance of the school, economic needs of the country, and legislative provision governing recruitment and selection.

The Open University (1988:61) concurs to the above postulation by stating that job analysis expressed in job description (as described above) and job specification (which include characteristics, qualifications, experience, aptitudes, interests, personal qualities and circumstances) produces a specification of the kind of person required to perform the job and remain in the classroom. It links competencies – skills, knowledge and attitudes – to particular tasks.

Job analysis is an act of personnel planning which, essentially involves looking ahead to future staffing needs and planning accordingly. The main factors, as outlined by Jones & Walters (1994:59-70) and Emmerson & Goddard (1993:21-36), include:

2.3.3.1 Curriculum and management requirements

- (a) Organisation of the curriculum
 - What is the curriculum to be?
 - How will the school day be organised?
 - How many teaching groups are required?
 - How many lessons need to be taught in each subject?

(b) Management tasks

- Which tasks need to be carried out?
- How much time needs to be devoted to each task?
- Which tasks are carried out best by teachers, and which by non-teaching staff?

Perhaps it is proper to state that a consideration of management tasks such as curriculum co-ordination, pastoral support, management, finance, personnel, site-management, and administration is necessary in determining staff needs.

(c) Management structure

- What sort of hierarchy is required?
- How will the curriculum and pastoral functions be managed?

2.3.3.2 Forecasting student enrolment

A school's educational philosophy, curriculum, and organisation for delivering instruction impact on how work is allocated to positions. Equally important is that planning for personnel requirements must take into account the number of students to be reserved (Jones & Walters, 1994:59). Forecasting entails making projections of staffing needs based on past enrolments. The basic assumption underlying this model is that past trends will continue into the future. However, this model does not explain what produced changes in past enrolments nor does it provide reasons for future enrolments. The changes may have occurred, but this model simply projects the pattern of historical changes into the future. The accuracy of projected need is, of course, dependent on the accuracy of the enrolment projections and the ability to set class size ratios. The following factors impact significantly on forecasting:

(a) Changing demographics

Currently South Africa is undergoing a demographic transition in which the present group of 10 to 14 year-old represent a demographic peak. A study conducted recently (Pretorius & Heard, 1999:6) concur to this argument by saying that

"We found that the largest number of children in the population were 10 to 14 years old then. They are now moving high schools".

Therefore, there is a projected shortfall of teachers in secondary schools. Schools may face having 80 to 90 learners per classroom. While primary schools are likely to slow down in enrolment, enrolment in secondary schools will continue to grow until the demographic peak has passed the secondary phase. Consequently, provision of educators will have to keep pace with increasing enrolments (Krige, Dove, Mokalima & Scott, 1994:36).

Jones & Walters (1994:66) contend that numbers of children alone should not determine the number of teachers needed. Management plans should view teaching and learning holistically. For instance, learners face a myriad of challenges such as drug abuse, rape, HIV/AIDS, and being raised from one-parent families. These challenges impact heavily on deployment of teachers. Therefore, traditional classroom staffing ratios are likely to deprive learners of individual attention they so desperately needed.

Educator: learner ratio is another means of determining staffing needs in schools.

Table 2.7: Post provisioning expressed as educator-learner ratios in the Northern Province

Year	Less favourably staffed schools		More favourably staffed schools	
	Primary Schools	Secondary Schools	Primary Schools	Secondary Schools
1996	1:45	1:40	1:33	1:28
1997	1:43	1:38	1:36	1:32

Source: Department of Education (1996:12)

The World Bank has done studies indicating that teacher : pupil ratio of 1:25 and lower are important for success. Vadi (1998:9) argues that teacher : pupil ratios are averages and they often translate into class size of 45 or more. Therefore, it is proper that educator-learner ratios are interpreted in relation to:

- class size; and
- educator's workload.

The latter should be seen to mean the teacher's duties and responsibilities as indicated in the job-description. The educator-learner ratios are retention ratios (Seyfarth, 1996:29) which help to retain teachers in close relation with specific terms. In this process, trends in enrolment are evaluated and the evidence from evaluation is used objectively for staffing needs.

(b) School choice options

With the advent of democracy the divisive walls which kept opportunities for other groups outside were brought down. Education restructuring and transformation policies created an enabling environment whereby enrolment remains the parent's choice. In the past parents had a limited choice which was enforced by separate racial education systems, population racial classification, segregated racial settlement areas, etc. The new dispensation allows parents to enrol at schools of their choice (Henig, 1994:21).

According to Venter (1997:242) when schools integration took place, it included a ban on public schools setting means tests or aptitude tests, or any other method that could be used to deny a child entry to the school. Even inability on the part of parents to pay school fees could not be a bar to a child's acceptance. Hence, there is a scramble for private pedagogy and the simmering enrolments. The Star (1998:10) confirms this by stating that:

"private school enrolments have surged 12,3% ... eclipsing an 8,6% rise in public township school enrolments".

Pearson (1993:86) acknowledges the fact that school choice is about economics applied to education. Education economic activities are organised by supply and demand. The market theory requires that public education services be provided at fixed costs and enormous capital investment. It means that provision of education (as providers of services) is determined by demand and supply. Declining learner enrolments means that staffing should be pruned accordingly.

Although in Britain (Open University, 1988:68; Wright in Pluckrose, 1980:143) and USA (Henig, 1994:5; Randal, 1994:96-99) school choice "have been around for the last decade," in South Africa (Johnson, 1999:13) it is a new trend. This trend is growing as a result of the need for quality education. There are push factors and pull factors, which militates on personnel provisioning with regard to the choice model (Henig, 1997:101; Reid, 1997:108; The Star, 1998:10 and Mokgomme, 1997:6). In the same vein, Fennimore (1996:55) is of the opinion that staffing needs is informed by the following considerations that:

- All children are equally valued and will receive equal consideration;
- The public schools are accountable for equitable distribution of resources to all children regardless of parental choice of available options;
- The public schools remain committed to progress toward best practice for all students;
- The public schools remain committed to full intellectual development of all learners;
- The public schools remain committed to lifelong learning.

2.3.4 Tenure for Professional Personnel

Tenure for teachers is another way of recognising competence. Jones & Walters (1994:191) define tenure “as permanent job status granted to employees following successful completion of a probationary period. It refers to the status of school employment in which a teacher, by having served a probationary period of so many years, has his/her job security protected by law or school board policy. The teacher cannot be dismissed except through legally specified procedures”.

Castetter (1981:465) finds tenure to embody a system designed to provide educators with continuing employment during efficient service, and establishes an orderly procedure to be followed before services are terminated. Salient features of the tenure system include:

- Completion of a specified probationary period, construed to mean a temporary appointment during which time the individual is carefully supervised and appraised in terms of ability to render efficient service to the school organisation.
- Automatic tenure status at the end of the probationary period to personnel who meet performance standards.
- An orderly procedure for dismissal of personnel.
- Notice of intent to terminate services of the individual in the event that desired improvement in performance has not been attained.
- A hearing before local school authorities, which provides opportunity for the affected staff member to defend him- or herself against the charges.
- The right of appeal.

In general, tenure is construed to be a privilege granted by the employer rather than an obligation the employer owes to the educator. According Jones & Walters (1994:193) the purpose of tenure is to provide security of employment. At the same time it provides legal protection against unwarranted dismissal and precludes the possibility of a school governing body resorting to subterfuge by dismissing teachers at the end of the probationary period. Tenure is a form of

protection for the teacher in that it ensures retention of teachers in the classroom.

This assertion raises a few questions like : How does an educator attain tenure? Is tenure a right or privilege? Can the employer make changes on the tenure status? Can educators who have attained tenure be reassigned to different tenure positions? How is tenure viewed in terms ratios and relevancy of skills? Can the employer change conditions of service of tenured educators? What is the relationship between tenure and quality? Answers to these questions are covered in the following aspects.

2.3.4.1 The tenure process

Steffy (1989:5) argues that tenure protected teachers in search of truth. That too many schools are staffed with stale and burn-out teachers, requires a reconsideration of tenure. That dull students are products of dull teachers, calls for urgent review of tenure. Hence, Steffy (1989:5) asserts that tenure no longer affords any teacher the “option of doing his own thing”. Tenure should be viewed in the light of the need for accountability. The system cannot afford to remain static, sterile and unproductive. To grant tenure to a teacher who is not an expert or master teacher is to say to the students, the parents, the school governing body, and the public that the goal of the system is to be average.

Taking the position that the teacher must demonstrate he/she is an expert or professional prior to receiving tenure places a whole new level of importance on the competence of the teacher. Rather than viewing teachers as new to the system and still learning, the stage of professionalism requires them to demonstrate their skills.

The tenure process is frequently the cause of misinterpretations when viewed to mean permanent employment. Castetter (1981:466) attempts to dispel certain myths associated with tenure viewed as permanent employment by stating that:

“Customary practice is to grant permanent tenure after an individual has served a probationary period. Permanent tenure, however, does not necessarily mean the local board of education has no authority to make changes affecting persons who have gained tenure status. It does not mean, for example, that the board, so long as its actions are

not arbitrary and capricious, cannot transfer a teacher from one school to another. Tenure of employment and tenure of assignment are not necessarily synonymous. Nor does it mean that tenured teachers cannot be reassigned to different tenure positions. If the board decides to reduce the size of the staff because of declining enrolments, existence of tenure legislation does not prevent the board from taking such actions”.

In short, it is generally not the intent of tenure laws to prevent boards of education from making necessary changes involving tenured personnel. Permanent employment does not mean an absolute absence of change in conditions of employment. Thus, the objectives of tenure for professional educators are:

- Security of employment during satisfactory service.
- Protection of personnel against unwarranted dismissal.
- Academic freedom in the classroom.
- Permanent employment for best qualified personnel.
- Staff stability and position satisfaction.
- Freedom outside of the classroom commensurate with that any other citizen.
- Liberty to encourage student freedom of inquiry and expression (Casterter, 1981:466).

Tenure as a process is geared towards quality public education. Hence it is the prime aim of the employer to improve the school system through the tenure, which is designed to protect the public and their children from incompetent teaching. The employer's purpose is also to protect teachers against arbitrary acts inspired by political, personal, or capricious motives. Tenure is not intended by the employer to establish an occupational haven for incompetent, unqualified and unscrupulous teachers. Thus, tenure is designed to protect not only the interests of personnel, but the State (employer), the system and its clients. The process commences with consideration of academic and professional factors, and experience as well as contextual factors and is continued by a regular consideration of:

- Curriculum assessment which embodies classroom performance and professional involvement.
- Service matters which embraces personal factors, approach and commitment.
- Administrative competence expressed in terms of planning, organisation, control and leadership as well as discipline.
- Development plan (Maile, 1998:168-172).

Finally, tenure is attained by immersing teachers through phases of developmental assessment after which tenure is recommended for individuals. Therefore, it means that there are methods of obtaining tenure. This is discussed below.

2.3.4.2 Methods of obtaining tenure

It is commonly believed that every educator should automatically obtain tenure. This militates against the demand for quality in the public education service. Providing individuals with permanent appointment or tenure calls for a review of the whole process. Much as tenure is used to motivate educators, it is also necessary that expression of confidence in educators should be juxtaposed against their level of production. Thus, a probationary period is an essential part of the tenure process. In the same breath, ELRC (1997:3) provides that:

“In order to be appointed in a permanent capacity, a person has to be a South African citizen and to be appointed either in a temporary or permanent capacity, a person must be registered with the South African Council for Educators (SACE). A permanent appointment is normally made after a probation period of 12 months, which may be extended by a further 12 months. Educators may be promoted or transferred during probation and educators employed in a permanent capacity may be promoted on probation. The probation period of an educator is extended by the number of days leave taken during the probation period. The period of probation continues until the educator is officially informed that the permanent appointment has been confirmed”.

It is significant to discover the capabilities of an individual and to know how the person being evaluated can fit into the staffing pattern of the future. This requires developmental instruments in order to objectively arrive at a qualitative declaration of the individual's tenure status. However, a second chance should be provided. To give permanent status to unsatisfactory personnel is a professional error and a waste of taxpayer's money (Jones & Walters, 1994:194). To protect those who are unsuited for permanent status will in the long run reduce the quality of the teaching staff. Tenure should not be an award to those who just manage to survive only for the probation period.

In the same note, Steffy (1989:152) contends that by giving educators tenure automatically the employer shows lack of commitment to excellence and is ignorant to theories of human development especially intellectual development. Such a gesture goes directly against the fact that not every teacher grows at the same rate or that individual growth rates can somehow be absorbed within a 12 months period. According to Piaget in Naude & Bodibe (1986:20) cognitive development is based on four distinct developmental stages:

- the sensory motor stages;
- the pre-operational stage;
- the concrete operational stage; and
- the formal operational stage.

It must be noted that in terms of Piaget's theory not all (including educators) can reach the stage of formal operations – which is characterised by abstract reasoning and scientific reasoning. Although this theory is made on studies based child development, it is relevant to educators. Thus, it is necessary that tenure be inclined to be selective in permitting the organisation to employ on a permanent basis only those who have attained excellence required for such appointments (Casterter, 1981:467). Mahlangu (1989:145-148) concurs to this by asserting that tenure based on the aspect of development should follow a pattern, be continuous process, consider that the rate of development changes and acknowledge that individual differences in rate of development remain constant. Therefore, some teachers might be ready for tenure after one year of

service, and others not until five, seven or perhaps ten (Steffy, 1989:153). And finally, tenure should not be regarded as a right but a privilege. Educators are expected to assume certain obligations.

Another method which can be used in order to help those teachers who struggle to reach the required level of competence is appraisal. This method attempts to address the puzzles associated with educators with experience or are serving in the system for some years but performing below par. It addresses management concerns which include

- notice of unsatisfactory work; and
- professional growth requirements.

Therefore, it is apparent that appraisal of educators which aims at giving tenure is premised on the imperative of development which ensures that what is supposed to happen actually happens, that everything educators do has added value and provides value to the customer; that teachers work efficiently, that teachers are constantly striving to improve their output, and that they are never resistant to change (Arcaro, 1995:24). In this way appraisal ensures that authorities get the rights results by giving tenure to educators who meet the needs of parents, learners, the public and the employer.

Appraisal process elevates teachers to the status of lifelong learner which entails that educators strive to perfect old skills by engaging themselves in questioning, seeking new understanding and mastery of new skills. Thus, attainment of tenure will be perpetual struggle characterised by educators taking risks (Scheetz & Benson, 1994:28). The notion of appraisal is aimed essentially at an acknowledgement of the positive aspects of the educators' performances. It rests on the belief that nobody is just full of faults. Nobody is only and totally negative. Assessment of educators' performances also need to note the things that they do that are good – the positive aspects of their practices. Thus, the notion of appraisal is married developmental approach. Appraisal recognises the complexity of competence. Nevertheless, it seeks to build on the strength that educators have rather than basing tenure on the educators' faults and negatives.

But it is not blind to negatives. It notes negative aspects, if they exist. It furnishes remedial programmes to the negatives (ELRC, 1998:55-56).

2.3.5 Redeployment and Retention of Teachers

A problem facing human resource managers is the impact of macro-economic factors and micro-educational constraints on the supply of teachers. Redeployment emerges at the time when unemployment is sky-rocketing in South Africa. Although it does not necessarily mean laying-off educators, in the long run some educators may not be absorbed in the system. The present perception of the employer is that the present public service is overbloated (Nxesi, 1998:5). The question that needs to be answered is: What has created this perception? The following aspects are an attempt at answering this question.

2.3.5.1 Macro-external factors

(a) Macro-economic policy

The restructuring of the education system is clearly one of the key challenges facing South Africa. This restructuring is undertaken to redress past imbalances. The changes that are needed are not just in the area of delivery (teaching and learning materials, better and more schools in under resourced areas), but also include curriculum development, re-education and re-training as well as re-skilling of teachers, equity and representivity in staff composition of organisations. The greatest threat to education restructuring is the availability and distribution of resources. According to Mabusela (1998:18) education provision has been grossly undermined by the adoption of structural adjustment programmes (SAPs). SAPs have forced governments to adopt cost cutting measures which have had a catastrophic effect on education.

Structural adjustment programmes emanate from the government's Growth, Employment and Redistribution (GEAR) strategy. According to Mabe (1998:12) GEAR strategy was devised by economists from the Development Bank of South

Africa and the Reserve Bank. While in some African states the SAPs were imposed by International Monetary Fund (IMF) and the world Bank as a strategy to help them in the repayment of their loans, South Africa voluntarily entered such 'copy-cat economic cat walk'. SAPs include:

- The reduction of the government deficit through cuts in public spending; and
- The reduction of public sector jobs (Clarke, 1998:10).

These provisions impact profoundly on personnel provision. Instead of regarding education as a necessary imperative to develop, reconstruct and democratise, education becomes a social spending which cripples economic growth. As result employment rate is reduced. Reduction of public sector jobs comes at the time when there is an increment in student enrolment (Turok in Clarke, 1998:10; Pretorius & Heard, 1999:6).

In South Africa the education budget accounts for 21.3% of total government expenditure and 6.5% of GDP. This is the second highest budget item line. Now because GEAR attempts to cut expenditure, these figures are seen as very high. It is contended (Mabe, 1998:13) the amount spent on education is large in terms of world standards – developed countries pay only 5.4% of GDP and developing countries spend 3.9%.

The problem is that South Africa is a developing country with a huge backlog in education resources and its level of development lower. Therefore we cannot compare South Africa with developed countries who use their budgets only to maintain their already well-resourced education systems. South Africa desperately needs more financing for reconstruction and development.

(b) Globalisation

In order for South Africa to remain competitive, its human work force must be well-prepared to meet international challenges – which come in the form of technological advances and scientific theories and models. Stevenson & Pellicer (1996:10-12) project that

"Much of the instruction of tomorrow will be delivered by some form of technology. ... While relatively traditional technologies involving television and video-tapes will still be used, there will be a growing reliance on interactive technology ...

Moreover, information to complete research assignments will be available without a student having to leave his or her work station. Using the internet a student can literally access the world in search of data of his or her topic of study. Paper products will be noticeably absent – no textbooks, no workbooks, no notepads. All materials, both instructional and student generated, will be housed within the individual laptop computer each student carries between home and school.

Classrooms will be wired so teachers can present information electronically, using data housed in the school library ... There will be no need for chalkboards as students, networked within the classroom, will see their work displayed on their own computer monitor and also on a panoramic classroom monitor near the teacher's electronic work station".

The new age of instructional technology impact heavily on personnel provisioning. For instance, educators who will be retained in schools should be au fait with the internet and e-mail. However, there is an overemphasis on technology as if technology operates itself. This kind of speculation is not uncommon. According to Conradie (1998:1) when Thomas Edison invented the motion picture, educators rejoiced : they expected that this new technology will move a step forward in education by bringing the world into the classroom. The same speculation was common in the introduction of television. Currently the same happens with computers. The speculation about computer usage will also end like the former. The teacher will forever remain an indispensable resource that withstand the test of time.

On the other hand, it should be acknowledged that educators should be skilled in this technologies lest they be irrelevant. Schools should, when taking a skills audit, consider the educator's potential to grow in this direction.

(c) Human resource development

According to Nel, Erasmus & Swanepoel, (1993:12) South Africa has oversupply of unskilled workers generally. It is for the same reason that the Department of Education (1998:9) declares the labour market to be distorted. This is attributed to the effects of apartheid. There is poor articulation to the effects of apartheid. There is poor articulation between education, training and work, in the phenomenon of jobless growth and mass unemployment, in the continuing racial obstacles to occupational mobility, in the paradox of continuing skills shortages at a time of declining investment in training and most devastatingly, in the collapse of the youth labour market.

These problems emerge from apartheid education which made an all-out effort to ensure that Blacks are kept away from science and technology. This was Verwoerd's policy which is reflected in his statement in Parliament in 1953:

"When I have control over native education, I will reform it so that natives will be taught from childhood that equality with Europeans is not for them". (Govender, Mynaka & Pillay, 1997:180)".

Verwoerd went further to declare that:

"There is no need to teach a Bantu child Science and Mathematics, because the government will not allow him to use it". (Motswaledi, 1996:4).

As a result Science and Mathematics educators remain few or even scarce. This was declared by Verwoerd in 1953 when saying that:

"There is no place (for the Bantu) in the European community above the level of certain forms of labour".

There was a deliberate deprivation, the legacy of which still haunts education. Many teachers are trained and educated in languages and human sciences. There is a skewed shortage of Science, Mathematics and Technology teachers. According to Kahn (1997:76) the implementation of National Qualifications Framework arises from a recognition that education cannot proceed under previous assumptions. Constant learning, rapid innovation and the ability to acquire new quantifiable skills through a range of educational experiences, are all attributes of learners and learning system of the 21st century.

Human resources development need to transcend the barrier that "science is elitist – not everyone can do it", and meet challenges posed by new technologies (Butcher, 1997:78). In addition, Kros (1997:66) states that the development of human resources should be complemented by changes or Africanisation of the learning material. Human resource development should be a priority if one considers Shindler (1997:144)'s observation that

"Of all educators, 64% were properly qualified and 7% were professionally unqualified. The remaining 29% were underqualified, with less than a standard 10 certificate and a three year teaching qualification".

The conundrum is which educators to redeploy? If redeployed, who is to take or reappoint them because of the stigma attached to them? There are questions like: Why is he/she declared in excess? What are his/her qualifications? There should be a consideration of other factors such as those below.

(d) Curriculum changes

Curriculum change is another aspect which addresses retention of teachers as a problem. Curriculum should be regarded as a resource which impact on personnel planning. When the curriculum is transforming it means that personnel provisioning should resonates with it. The skills, knowledge and attitudes of teachers should be in line with the changes envisaged. This paragraph should be regarded as a continuation of paragraph 2.3.3.1.

(e) Changing values

The changing values are strands that develop from our newly acquired democracy and stretch through curriculum changes discussed above. According to the African National Congress (ANC) (1995:4) human resources management is underpinned by the following values:

- The development of human potential, so that every person is able to contribute freely to society, advance common values, and increase socially useful wealth.
- The realisation of democracy, so that independent, responsible and productive citizens will be enabled to participate fully in all facets of the life of their communities and the nation at large.
- The reconciliation of liberty, equality and justice, so that citizens' freedom of choice is exercised within a social and national context of equality of opportunity and the redress of imbalances.
- The pursuit of national reconstruction and development, transforming the institutions of society in the interest of all, and enabling the social, cultural, economic and political empowerment of all citizens.

Although these values commit organisations to national expectations, it is necessary to note that it is becoming more and more customary to involve and consider gender imbalances when retaining staff. Thus, staff compositions are guided by the above values. And these values should also be reflected in the programmes offered by the education system. Therefore, equal opportunities remain the most crucial principle in staffing.

(f) Education policies

It is apparent that when the apartheid government was brought down and a new democratic dispensation was established, all policies should change to advance the imperative of democracy. This change has far reaching consequences for education, and in particular for personnel management. The ANC (1995:52) has

noted from the onset that, as a result of apartheid policies which have led to inequity and inefficiency:

- The geographic distribution of education facilities is uneven and does not match the requirements for the new education system.
- There are gross disparities, in terms of size, facilities, equipment and staff, between the best developed and least developed institutions. The least developed institutions are in the African system.

As a result of these considerations the new education system is to be backed by policies which aims at reconstruction and development. With regard to human resources management it means that the system must

1. "provide equal opportunities to all irrespective of race, colour, sex, class, language, age, religion, geographical location, political or other opinion ...
2. "be directed to the full development of the individual and community, and to strengthening respect for human rights and fundamental freedoms ...
3. "be based on the principles of democracy, non-racism, non-sexism, equity and redress to avoid the pitfalls of the past.
4. "and education policies must ensure that education and training are provided in accordance with national standards" (ANC, 1994:60).

It must be noted that policies are statements that describe what governments expect to do, or believe they are doing, and the reasons for such actions or proposed actions. They indicate a government's intentions. It is a common error for policy documents to give the impression that policies are matters for governments only, both to determine and to execute. In a democracy policies are arrived at through social and political processes which involve all major stakeholders and interest groups. As such policies are national concerns. Policy is an expression of the endeavour to pattern both service rendering and the allocation of power (decision making and resource allocation in the education system (Wielemans & Berkhout, 1997:18).

If policy reflects on historical realities, democratic provisions enshrined in this new policies then becomes a source of conflict because of competing values (such as choice, equality/equity, efficiency and quality). For example, Thompson, Wood & Honeyman, (1994:57) contend that

"providing equal dollar inputs for unequal students produces unequal results. Equal spending does not make education the great equaliser of the conditions of men ... if education is to facilitate the movement of the poor and disadvantaged into the mainstream of ... social and economic life, if it is to afford everyone equal probability of success, then equal facilities, teaching skills, and curriculum are not the answer. Additional resources must be made available to" disadvantaged groups.

This argument holds the truth for personnel provisioning, as resource allocation. That the African education system is laced with un- and underqualified educators, and that classes are overcrowded, calls for a special consideration when human resources are allocated.

2.3.5.2 *Micro-organisational constraints*

(a) Management-related factors

Redeployment and retention of educators are management related factors. These are factors that are related to decision-making powers of the educators' immediate manager – the principal. Management decision-making is guided by values such redress, nation building, equity and equality. Factors such as globalisation, new economic realities, science and technological advances are the imperatives which impact heavily on the school curriculum. Seeing that the curriculum has changed according to the new dispensation, it becomes necessary that management decisions with regard to personnel provisioning should resonate with values outlined above and curriculum needs of the school.

According to Potgieter, Visser, Van der Bank, Mothata & Squelch (1997:8) the school manager must recognise all stakeholders and interest groups when making decisions. The principle of partnership, as enshrined in the South African Schools Act (Act No 84 of 1996) singles out co-operation of school managers

with the state, parents, learners, educators, other members of the community in the vicinity of the school, special education bodies and the private sector. All stakeholders in education must accept responsibility in personnel provision. Management division partnerships are generally characterised by:

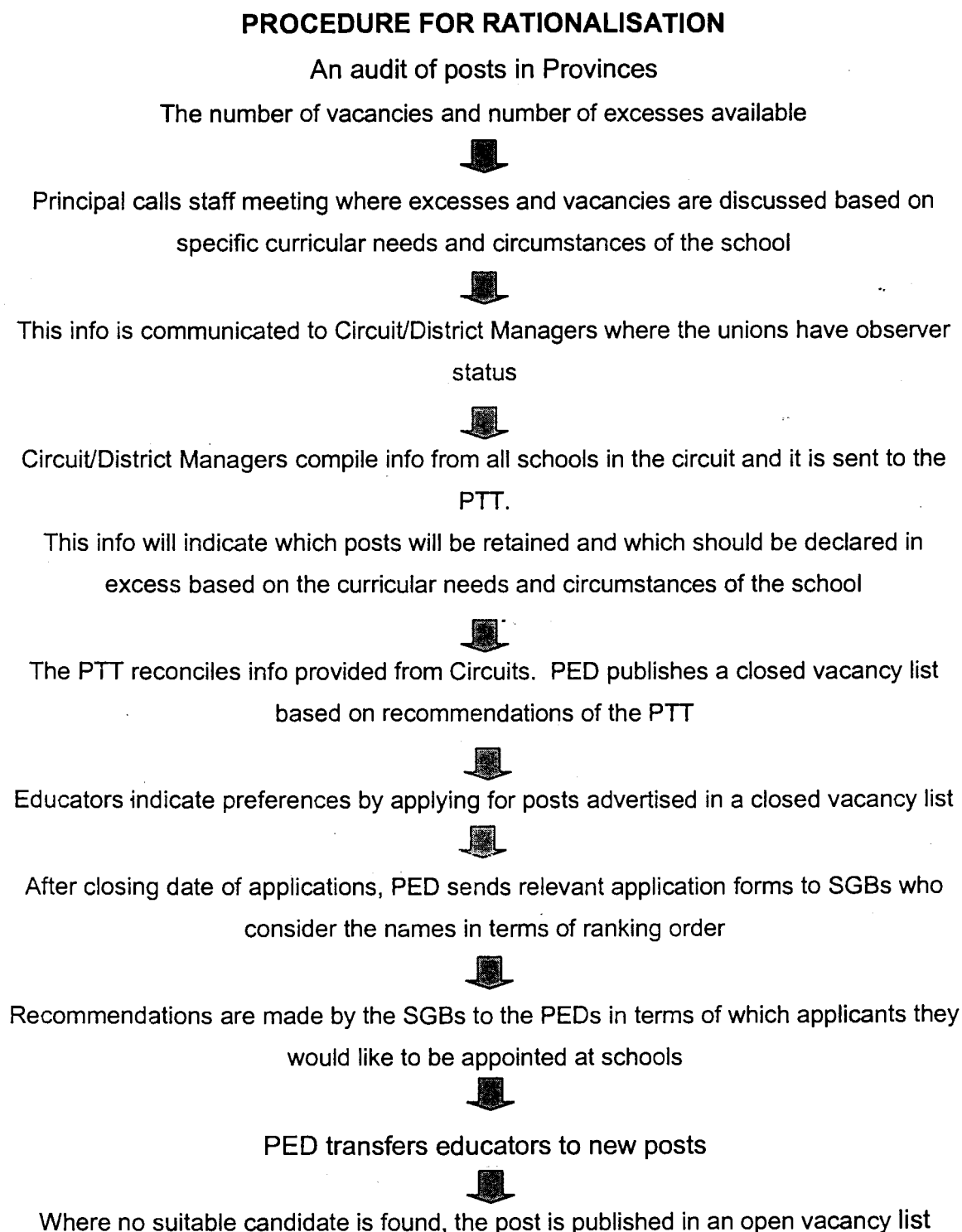
- Mutual trust and respect,
- Shared decision-making,
- Shared goals and values,
- Common vision,
- Open communication,
- Good teamwork,
- Promotion of the interests of the partnership rather than those of the individual, and
- Respect for the roles of different partners.

According to the Department of Education (1997:32) a democratic decision making process means that decisions must either be taken by agreement (consensus) or by a majority vote. A consensus is necessary so that all members have a voice in decisions, differing views are heard, everyone supports the final decision and so that a sense of common purpose is developed.

(b) Bureaucratic Constraints

In a democratic set up decision-making is a process. As a process it entails that certain procedures have to be followed before taking a decision. According to the protocol provided in the ELRC Resolution 6/98 it is required of the human resources incumbents to follow procedures set out for rationalisation and redeployment. The table below outlines procedures for rationalisation.

Figure 2.4: Procedure for rationalisation



Source: SADTU, 1999:2

These table serves to provide bodies which are involved in staff reduction. Bodies such as School Governing Body, Site-structure(s) in form of Unions or Associations, Learners Representative Council, etc should not be ignored. They

play a pivotal role in personnel provisioning, and if conflicts, arising from decisions taken, are to be circumvented. These should be a point where the process starts and the point where it is finalised. This shall be discussed later.

(b) Schools and the Bill of Rights

Schools are affected by the provisions of the Constitution which entrenches the Bill of Rights. Because the Constitution is the supreme law of the Republic, it means that public organisations such as school are subordinate to the Constitution. Their laws and actions are invalid if inconsistent with the Constitution (Rautenbach & Malherbe, 1998:4).

A Bill of Rights as part of the entrenched Constitution protects everyone's defined rights against infringement. The Bill of Rights has far reaching and profound impact on human resources management. With regard to personnel provisioning, management have duties and responsibilities to respect employees' (educators) rights which include the right to:

- Non-discrimination,
- Equality,
- Language,
- Freedom of speech,
- Culture and religion,
- Safety and security,
- Education,
- Labour relations, and
- Property.

Therefore, school rules, regulations and policies should be consistent with these provisions, otherwise they will not prevail. These rights are entrenched to afford educators special protection against the power of the employer, and these rights are protected by other laws governing and regulating education (Beckmann, et al, 1995:5).

(c) Group dynamics

Staff reduction can be a cause of strained relationships if it is not implemented according to democratic principles. According to Everard & Morris (1990:70) staff members tend to polarise if retention procedures are selective. Cliques are formed as staff members experience inconsistent approach. This can be termed poor management and leadership which Vadi (1998:9) noted when in one particular school in Gauteng where there are three factions and three staffrooms. There is tension between different trade unions, tensions between teachers of different generations, there are ethnic divides, there are personality clashes.

2.3.5.3 *Redeployment and Retention processes*

Redeployment is a crucial matter that affect all educators. Through redeployment process equity in education will be an attainable goal which will ensure the real transformation of the education system. This process is informed by redistribution – outlined in redress and equity – and retention. Benqu (in SADTU, 1999:3) assures educators when declaring that:

"The first point is that the single aim of this process has been to achieve equity in the provision of human resources to educational institutions. Our apartheid past provided White, Coloured and Indian schools with far more human resources than African schools, and over the past few years we have attempted to redress this inequality. Because the cost of human resources is so large, achieving equality in this regard will certainly contribute to greater equity within education as a whole.

The second point relates to the allegations of downsizing in the education sector ... no single teacher has been forcibly retrenched, and there are no indications that this will happen in future."

Therefore, redeployment is used to distribute the current human resources more equitably, then educators will be retained in that way. There are crucial factors which are related to transformation of education. Redeployment entrenches principles of redress ad equity, protects individuals against lay-off, protects educators from historically disadvantaged institutions who do not meet the minimum requirements, but who have been employed on a continuous basis for longer than 10 years (SADTU, 1999:1). Where does the redeployment process starts?

A key person in human resource planning is the principal. He or she is usually the first person to spot dwindling enrolments. The principal can supply the Circuit/Areas office with up-to-date and projected enrolment figures and with projected staffing needs. The principal also has front-line contact with staff members, learners and parents. Therefore, he or she should be responsible for preparing teachers with possible re-assignment and for easing concerns of parents and learners (Rebore, 1991:32-33). The following are the steps in redeployment.

- (i) Determination of the educator post establishment. This step begins with identification of procedures to allocation of approved posts. This is executed by the provincial department which must provide all education institutions of its educator post provisioning, which may increase or decrease or decrease the number of posts at many institutions. The staff establishment of each institution is based on the pupil enrolment figures of the previous year and the weighting factor allocated to the various phases and subjects. The total number of educator posts in each province is calculated on an average learner:educator ratio. Posts are allocated to schools according to a distribution model taking weighted learners into account using the following formula (SADTU, 1999:2):

$$P = \frac{wl}{totwl} \times [pn(cxinst)] + c$$

- p = post allocation to institution
- wl = total number of weighted learners at institution
- totwl = total number of weighted learners in the Department
- p = total number of posts to be distributed to all institutions
- c = constant value between 0,4 and 1 that determines the extent to which smaller institutions are benefited.
- inst = total number of institutions to which posts need to be distributed.

The weighting of the learners, and in accordance with the post provisioning needs does the determination of the educator post establishment. The weighting norms for public schools are expressed as:

- A learner in grade 1, 2 or 3 is counted as 1,15 weighted learner
- A learner in grade 4, 5 6 or 7 is counted as 1 weighted learner
- Learners in grade 8 and 9 are weighted in terms of their respective study fields.
- Learners in grade 10, 11 and 12 are weighted in terms of all their subjects.

Table 2.8: Weightings from the post-provisioning model

Animal Husbandry	0,421	Technica (all disciplines)	0,421
Agricultural Science	0,215	Tractor Mechanics	0,421
Applied Agricultural Science	0,512	Typing	0,215
Art	0,351	TV and Radio Electrician Work	0,421
Biology	0,188	Veterinary Practice	0,421
Bricklaying and Plastering	0,421	Watchmaking	0,421
Building Construction	0,421	Welding and Metalworking	0,468
Computer Studies	0,215	Woodwork	0,301
Dance / Ballet	0,502	Woodworking	0,421
Dance Performance	0,502	All other examination subjects	0,172



Design	0,361	Non-examination subjects	0,172
Electrician Work	0,421	(combined)	
Electronics	0,421	SPECIAL STUDY FIELDS FOR	
Farm Mechanics	0,421	GRADES 8-9 STUDY FIELD	
		WEIGHTING	
Field Husbandry	0,421	Agricultural or Technical +	
Fitting and Turning	0,468	practical component	1,35
		Art or Speech and Drama +	
		practical component	1,30
Graphic Art	0,361	Music or Dance + practical	
Home Economics	0,361	component	1,65
		Hotel keeping and catering	1,25
Hotel Keeping and Catering	0,361	All other	1,18
Mathematics	0,188		
(incl. Functional maths)			
Metal Work	0,301	LEARNERS WITH SPECIAL	
Motor Body Repairing	0,421	EDUCATIONAL NEEDS (LSEN)	
Motor Mechanics	0,421	Specially Learning Disabled	3,0
Music	0,502	Severely Mentally Handicapped	3,0
Music Composition	0,502	Epileptic	3,5
Music Performance	0,502	Cerebral Palsied	4,0
(2 nd instrument)			
Needlework and Clothing	0,301	Physically Disabled	4,0
Painting	0,381	Severe Behaviour Problems	5,0
Physical Science (incl.	0,188	Hard of Hearing	5,0
Functional Science)		Partially Sighted	5,0
Plumbing and Sheet Metal Work	0,421		
Sculpture	0,361	Blind	5,0
Shorthand / Snelskrif	0,215	Deaf	5,0
Speech and Drama	0,361	Autistic	6,0
Technical Drawing	0,237		

Source: SADTU (1999:3) and Department of Education, (1998).

The total number of posts establishment allocated to institutions must be utilised according to curricular, co-curricular and extra-curricular activities. Historical imbalances are also considered in that an institution's curriculum will be addressed by having posts in a central pool for the allocation to schools where certain subjects are introduced, which require additional posts.

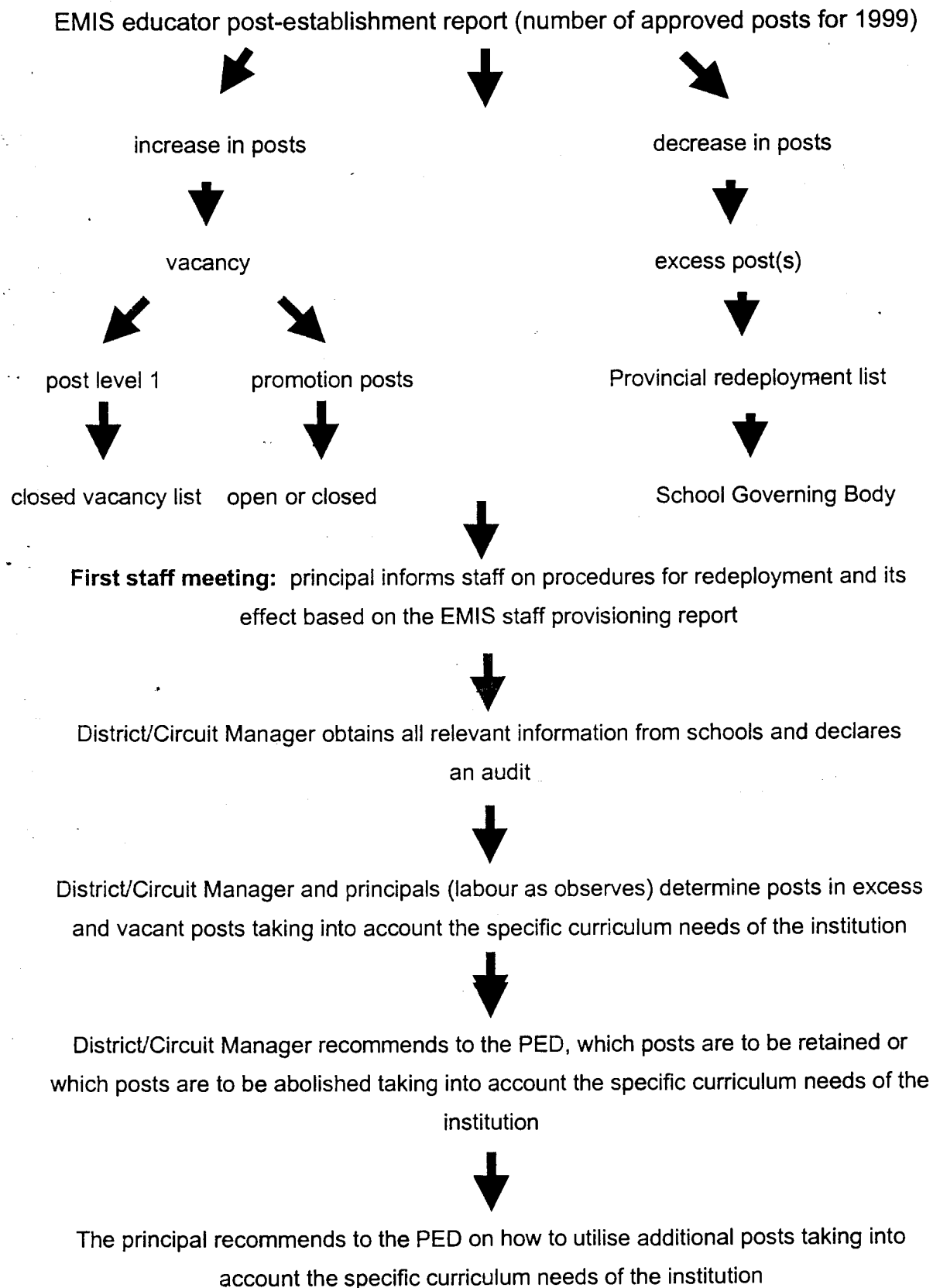
Furthermore, this process consider schools with more than one language medium of instruction. In order to provide for the additional demands of an additional language of instruction the number of weighted learners in each grade is increased by 15% of the number of learners who are being taught in another language than the language in which the majority of learners in that grade are being taught.

(ii) Determining excess and vacant posts. This step begins with the head of Provincial Education Department (PED) informing all institutions of its educator post provisioning. After receiving the above information, principals inform their respective staff on the procedure for redeployment. The district/circuit manager must declare audit based on the previous statistics of all schools in his/her district/circuit in respect of:

- Total number of educators per phase
- Total number of learners per phase
- Total number of educators declared in excess per phase and subject
- Total number of vacancies, including the requirements.

Information must be submitted to the Regional office. The Circuit/District manager together with the school principles shall determine the excess and vacant posts by taking into account the curricular needs of the school and the principle of Last-In-First-Out (LIFO).

Figure 2.5: Identifying Posts In Excess



(a) Curriculum needs

Educators presently teaching a particular subject/phase will be considered for redeployment in that subject and phase area irrespective of the fact that they are qualified and experienced to teach other subjects or phases. Considering that there is no specialisation in primary school, except for the distinction between Junior Primary and Senior Primary phases, therefore teaching experience and not qualification in a phase must be used to determine educators in excess. This principle also applies to subjects in the senior secondary school/phases.

(b) LIFO Principle

In determining which of two or more educators must be retained for a specific post, the principle of last in first out (LIFO) shall be applied. In applying the LIFO principle the current period of continuous service of an educator, as regulated by the Employment of Educators Act (Act no. 76 of 1998) must be considered. It appears that there is insufficient information and facts about the implementation of LIFO. What will happen in the case of a situation whereby due to curricular needs of the school a novice teacher is to be retained because he or she is qualified in the much needed stream, on the one hand. On the other hand, there is a oversupply of educators in certain streams and such educators have long experience. The difficulty is do managers have to consider experience or qualification for retention?

In the light of the above provisions a question still remains: Which factors should be considered when declaring excesses? The following are the factors to be considered:

- The curricular needs of the school
- The specific circumstances of the school
- The views of the staff when determining the above points
- LIFO

After an educator is declared in excess he/she is informed in writing by the PED of his/her excess. Particulars of educators in excess will be included in a provincial redeployment list, compiled by the PED and will include

- The name of the educator and other relevant details
- Rank and level of the educator
- Qualifications and experience of the educator
- Present educational institution of the educator
- Preference with regards to redeployment.

This information is sent to the Provincial Task Team (PTT). In fact what shall happen is that Provincial Education Departments should have developed a management plan which indicates the number of posts which they can afford and the timeframes in which they will complete the redeployment process. The process kicks off with the establishment of the Provincial Task Team (PTT) which is led by an independent chairperson. PED should also verify statistics of the number of educators that they presently have on their records.



Figure 2.6: Flow Chart C: Identifying Educators In Excess

District/Circuit Manager and school principals determine educators in excess



In the **Second staff meeting** the principal, after consulting the staff, recommends the possible absorption of excess educators in vacancies that exist or will exist in near future.



District/Circuit Manager and principals identify educators in excess taking into account the following factors:

1. The views of the staff;
2. The needs of the institution in relation to:
 - a. specific curriculum obligations;
 - b. number of classes;
 - c. timetable; and
 - d. allocation of learners to classes.
3. LIFO (period of continuous service)



The Department informs excess educators in writing



The particulars of excess educators shall be included on the provincial redeployment list

1. Name and other relevant details of educators;
2. Rank and level;
3. Qualifications and experience;
4. Present educational institution; and
5. Preferences with regard to redeployment.



The Provincial Education Department shall compile the particulars of vacant posts, including the post requirements.

Source: SADTU (1999:3)

- (iii) Filling of vacancies. School Governing Bodies (SGB) will be provided with a list of all permanent educators in excess – List A. Only after List A is considered will List B containing applications from temporary educators currently employed as well as those educators who have served the

Department in a temporary or substitute capacity in the immediate past, in the order of seniority be provided to the School Governing Body.

The School Governing Body must consider the names on the list in terms of ranking order and must make a recommendation to the Head of PED via the District office. All relevant stakeholders are consulted including teacher unions, and a consideration of relevant labour acts is made. For example, in terms of Section 8 of the Employment of Educators Act, 1998 an educator is redeployed by means of a transfer.

Figure 2.7: Redeployment of Educators

Department of Education receives details of all excess educators and the post requirements



The Department releases a closed vacancy list for post level 1 educators only.

1. Only educators in excess;
2. Currently serving educators; and
3. Former (since 1 July 1996) temporary and substitute educators may apply.



After receiving the applications the Department (labour as observers) matches educators with the identified posts.



The matching process follows the following steps in order of priority:

1. Permanent educators declared in excess in order of seniority.
2. Temporary educators, including former temporary educators in order of seniority.



The two matching lists are sent separately to School Governing Bodies.

1. List 1: permanent educators in excess (first consideration);
2. List 2: temporary educators in excess (second list is only sent to SGB after they have considered the first list).



School Governing Body makes recommendation in its order of preferences and in terms of the Employment of Educators Act, 1998 Labour as observers.



Department of Education makes appointment in terms of EEA, 1998



Where no suitable candidates can be found all such posts shall be advertised in an open vacancy list.



Promotion posts shall be advertised in an open or closed vacancy list

Source: SADTU (1999:3)

In this way professional educators are retained for the benefit of education. This is done within constraints of the labour market. What has been learned from the above is that retention strategy depends upon concerted action by line managers as well as professional personnel (Armstrong, 1992:74).

2.3.6 Teacher Attrition

Despite attempts by the employer to retain educators, there are certain constraints that militate against retention. Teacher attrition refers to the proportion or percentage of teachers who leave their positions with a given employer during a specified time period (Jones & Walters, 1994:67). Current research made by Pretorius & Heard (1999:6) predict that there could be a shortage of teachers in the entire South Africa. The reasons for this are varied. Pretorius & Heard (1999:6) cautions that there is a dramatic decline in student enrolments at training institutions. The decline is attributed to several factors, and they are discussed below.

2.3.6.1 *Reasons associated with Attrition*

Like it is mentioned above, reasons for teacher attrition are varied. When basing the argument on forecasts made in 1995 National Teacher Audit, there is a shortage of 600 teachers (Pretorius & Heard, 1999:6). The declaration that there is an oversupply of teachers is a myth. Steuteville-Brodinsky, Burbank & Harrison (1989:73) concur with Pretorius & Heard (1999:6) that teacher attrition is caused by, among other reasons,

- Poor pay;
- Tarnished image of the teaching profession;
- A perception that there is no job security;
- Bigger classes and workloads;
- Lack of educational resources;
- Unsafe environments;
- Job dissatisfaction;
- Poor opportunities for advancement;

- Management autocracy;
- Undefined job description;
- Lack of parental concern.

In addition to the above, Jones & Walters (1994:69) are of the opinion that teacher attrition is exacerbated by lack of trust in school leaders and discipline problems. Pretorius & Heard (1999:6) identify other reasons for teacher attrition as:

- Government's financially driven trimming of the teacher core;
- A growing HIV/AIDS crisis in the teacher population; and
- Natural teacher attrition realities such as death and retirement.

Furthermore, teacher attrition can be attributed to changes that are taking place in education. As a result of disillusionment caused by a myriad of changes, teachers opted for voluntary severance package (VSP) Nxesi (1997:34) confirms this by stating that:

"Provinces seemed to be approving vast numbers of VSPs, far in excess of the numbers initially envisaged (e.g. 11 700 packages nationally)."

Even though the government had stated that VSPs were supposed to merely facilitate redeployment and that South Africa desperately needed its teachers, teacher's scramble for voluntary severance packages.

2.4 REWARDING AND VALUING

When looking at the reasons for teacher attrition, one can infer that teaching is in serious crisis. Why do teachers leave teaching? Why is there few and insufficient teacher enrolments at tertiary institutions? In view of these questions, the National Association of Secondary School Principals (NASSP) (1984:3) finds that answers given to the above questions link teacher quality with the decline of the culture of teaching and learning. Perennial problems, such as how to attract and retain excellent teacher, and how to motivate teachers to remain committed

to their profession, remain haunting the education system. Thus, the purpose of the researcher is to:

- Analyse causes of difficulty in attracting highly qualified teachers, motivating all teachers and retaining excellent teachers;
- Identify types of rewards, variables affecting rewards, career paths, and
- Outlining alternatives to keep teachers on the job.

Further details on rewards and other forms of motivation and retention will be given in the chapters to follow. But first, one needs to establish a closer link between recognition of competence and rewarding teachers.

2.4.1 Attraction of Qualified Teachers

The caveats given by Pretorius & Heard (1999) above indicate that the attraction of qualified teachers remains a chronic problem especially in the sciences and technology sectors. NASSP (1984:3) unravelled this problem and find that the problem of attracting qualified teachers starts from the beginning when candidates apply for admission in teacher education and training institutions. Very few choose teaching and the best are not always chosen. The selection battery of these institutions should be geared towards quality. It means that selection procedures should be punctuated on required and essential competencies. Although such approach militates against the equity imperative in some cases, ways and means of attracting excellent teachers should be established because education cannot afford to remain average.

Why is teaching seeming to be less attractive? Steuterville-Brodinsky, Burbank & Harrison (1989:72) and NASSP (1984:3) grappled with this perception and find that teachers are less attracted to teaching and leave teaching because of meagre incentives. The irony to this problem is that in recent years in South Africa it is generally thought that the civil service is overbloated creating a problem whereby some other public servants 'are doing nothing.' This perception is the result of an integrated approach to public service. But when one views the situation through particularisation, education cannot be regarded as overbloated.

Studies made by Pretorius & Heard (1999); Krige et al (1994) and Venter (1997) confirms this. Rather it should be noted that there is an oversupply of trained and qualified teachers in certain streams like languages (vernacular in particular), and humanities. Therefore, historical trends and current socio-economic changes that impact on education reciprocally should guide attracting qualified teachers on the transformation imperative as well as development needs. Hence Venter (1997:243) states that:

"In general, it was held that there was an oversupply of teachers. In particular, there was an oversupply of teachers in urban areas, and an undersupply in rural areas. This over-under imbalance was reflected also between provinces with an urban preponderance, like Gauteng and the Western Cape, and those with rural preponderance like Northern and North West. Even more particularly, there was an oversupply of White Afrikaans teachers, and a shortage of teachers in the disciplines vital for development – English, Mathematics and Science. Quite how the education department reconciled the proclaimed oversupply of teachers with its minister's separate claim that 50,000 classrooms were required to meet immediate needs, and 35,000 were needed to accommodate the 1,8 million additional six- to eighteen-year-olds who would flock to the schools by 2000, and with the Gauteng government's claim that it was short of 100 schools, is not clear."

Despite the fact that this is a parenthetical argument, which must be left open, the views raised above seem to hold water as more teachers are needed. Perhaps a logical argument can be, in which disciplines? And a direction is already given, in Maths, Science and Technology.

2.4.2 Retention of Excellent Teachers

According to Venter (1997:243) South African public education faces a mammoth task of retaining excellent teachers, because there is a great exodus of teachers. This exodus is caused by, amongst others, the emerging school choice trend (private pedagogy), poor incentives, transformational changes (which include curriculum changes, Africanisation of the learning content), poor quality (committed and excellent teachers do not want to be associated with poor schools), and declining enrolments.

Therefore, public schools appear to be unsuccessful in retaining the best teachers. According to NASSP (1984:4) many of the more academically able teachers stay in teaching for a relatively short period of time. Although teacher turnover may increase, some researchers estimate that 50 to 60 percent of those who enter the teaching profession will leave it again. Most importantly, a concern should be raised about the number of ineffective teachers who are allowed to remain in the classroom. In that vein, there is a serious problem in many public schools whereby teachers absent themselves from work, spend a school day basking in the sun, ignore timetables and have discipline problems (Venter, 1997:241).

The problems of poor retention of quality teachers stem in part from some of the same factors responsible for the low attraction in the first place. It seems, subject to the findings in this research project, that the frustration comes from a lack of opportunity for professional growth.

Steuteville-Brodinsky (1989:73) and NASSP (1984:4)-5) cite the following as the causes for retention problems:

- Poor opportunities for advancement;
- Poor salary;
- Low status of teaching;
- Lack of concern from parents;
- Insufficient time for class preparation;
- Too many students in the class;
- Too much paperwork;
- Students' lack of interest;
- Frustration – inability to participate in decisions that affect their work in the classroom;
- Conflict with or lack of support from managers;
- Students' ill discipline.

2.4.3 Current Forms Of Incentives In Schools

Most research on this aspect revolves around motivation and the effectiveness of alternative incentives, and reveals a limited incentive attributes which exist in education. However, experience from the private sector provides valuable information, which can help in improving practices in the recognition of competence. I shall deal with this later, but first I shall unravel the significance of rewards as a means of motivation.

2.4.3.1 Motivational Factors

It is imperative to note that decisions about which incentives will best motivate teachers must reflect the right balance between organisational and individual needs. Equally important is an assessment of the personal qualifications demanded by the job. Furthermore, it must be noted that people are attracted to professions and occupations for various reasons, including particularly the need for security, self-esteem, intrinsic satisfaction, altruistic satisfaction, and high pay (NASSP, 1984:7). Similar reasons are associated with job retention, although their order of significance differs. However, motivation in the workplace shifts over time as changes occur in occupations and social pressures. A tight economy with few job openings heightens the need for security and income. For instance, recently the declining enrolments and budget reductions have reduced the teaching profession's ability to offer job security as an incentive. Therefore, it is still a question on which incentives will motivate academically strong students to pursue teaching? And which incentives will retain and motivate excellent teachers already on the job? The next paragraph shall answer these questions.

2.4.3.2 Incentives applied in Schools

Schools use two forms of incentives generally. They include intrinsic rewards and extrinsic rewards. Rebores (1991:249) defines intrinsic rewards as rewards that the employee receives from doing the job itself. Such incentives include, but are not limited to:

- Participation in the decision-making process;
- Greater job discretion;
- Increased job description (responsibility);
- More challenging tasks;
- Opportunities for personal growth;
- Diversity of activities.

Implementation of this kind of rewards requires that managers should be careful and consistent. Constraints such as the school climate – health and culture play a significant role in implementing intrinsic rewards. In a climate where there is internal strife and conflicts, intrinsic rewards may deepen the already sinking ship. Therefore, it is crucial that intrinsic rewards be implemented when the school climate is positive. Openness and transparency can also be useful ingredients for proper implementation.

Extrinsic rewards are divided into direct and indirect compensation (Rebore, 1991:249). The most common form of direct compensation is salary. According to the ELRC (1997:4-7) an educator's salary is based on the system of categorisation of qualifications with the Relative Education Qualification Value (REQV) and salary ranges applicable to educators in accordance with their post levels. In terms of the proposal made by the employer (ELRC, 1997:6) teacher's salaries will be adjusted to a higher position on the work performance. The salary increases as the teacher improves his/her qualifications or cash award will be given to educators who improve their qualifications which are categorised on REQV 14 and is calculated at 10% of the minimum salary in salary range 7 (for more clarification refer to tables 2.5).

Indirect compensation usually includes protection and welfare programmes. They are frequently referred to as fringe benefits (Rebore, 1991:250). ELRC (1997:4-7) cites them as:

- The government employees pension fund (GEPF) which includes
 - * Annuity
 - * Gratuity
 - * Income tax benefits
- Unemployment insurance fund (UIF)
- Workmen's compensation
- Paid leave which is due on
 - * Sick leave
 - * Vacation leave
 - * Special sick leave
 - * Special leave for accouchement purposes
 - * Special leave for quarantine purposes
 - * Special leave for study purposes
 - * Special leave for examination purposes
 - * Special leave for military training
 - * Special leave for participating in sport and cultural events
 - * Special leave for urgent private matters
 - * Special leave for continuity of service
 - * Family matters leave (birth, sickness of a child and death cases)
- Home owner allowance scheme
- Medical assistance scheme.

In conclusion, it must be noted that while school managers have no prerogatives to finalise on awarding extrinsic rewards, they have influence in indirect compensation by way of making recommendations on whether, for instance, a leave should be granted with pay or without full pay. Therefore, it is crucial that such recommendations should be carried out prudently and fairly with view to motivational factors impacting on the quality of teaching in schools. And finally, more creative ways should be explored to intrinsically motivate teachers so that the quality of teaching is improved. In that note, there is a need to consider the fact that there are variables that affect rewards. And this is the topic to be discussed next.

2.4.3.3 Variables affecting rewards

When rewarding personnel managers must take into consideration variables, which impact, profoundly on those rewards. They are performance, effort, seniority, skills and job requirements. These variables are necessary and essential if the reward system is to be credible and sustainable.

(a) Performance

It is economically important for a reward to be linked to performance. That is to say any reward offered should be executed on the basis of the job done or competence. Rewarding individuals requires criteria that define performance. It means that all staff members should be evaluated or appraised regularly. According to the ELRC (1997:6) it is not yet established as to the criteria to use in the assessment of performance of educators.

(b) Effort

If teaching work was like manual labour it was going to be easy to determine teachers' effort in teaching. Effort forms part of the perennial problem of labour relations because it is linked to performance. At the core of performance related labour conflicts, is the effort bargain. The employer wants to get the value for compensation given to the employee on the one hand. On the other hand the employee wants to be remunerated according to the effort put in the job. Here the conflict of interest arises from simple economics. Consequently, the argument emerges from the terms of exchange: Who is getting his or his money's worth? Without a clear definition of effort the employer has fallen prey to reward quantity rather than quality. The present recognition tendency based on matric results is misleading. Although examination results are but one element of what can be termed a clear indication of teachers' output, there is a need for managers to measure effort as required physical and mental effort. This requires evaluation of the job content and analysis of conditions. Conditions refer to the external environment within which work is done (Paterson, 1972:123).

Physical effort refers to the number of lessons physically attended; classworks, assignments, homework's, tests, projects given; extra-mural activities, etc. Mental effort includes the acuteness, shrewdness and competence of executing one's duties and responsibilities. Both methods require effective teacher evaluation procedures, plausible fair and equitable performance criteria, valid and verifiable measures of results, and objectivity and consistency in applying assessment measures.

(c) Seniority

The length time in a particular position had played a significant role in the allocation of rewards. However, with the advent of a new system of REQV the old system of categorisation of qualifications, salary scales and automatic annual salary increments are phased out. In terms of the new dispensation seniority does not determine rewards (ELRC, 1997:4). What gets rewarded is performance.

Nevertheless, seniority should be viewed as a process in the performance of educators in that a performing educator cannot remain at one level. Seniority as such is a way of appreciating career growth of performing individuals. According to Rebore (1991:245) this entails that the compensation plan should lead to career ladders (path) whereby teachers grow within the classroom. This shall be discussed later in a detailed form.

(d) Skills

There is a common practice of rewarding skills as expressed in education (and experience) of individual employees. The perception created by this practice is that higher qualifications means higher rewards. In reality what should be rewarded is the use of that education qualification. Therefore, skill refers to performance (Paterson, 1972:122).

(e) Job requirements

The complexity and responsibility of a job are after the criteria by which rewards are distributed. The bigger the responsibility, the higher the rewards (Rebore, 1991:248). This requires a clear definition of what one is responsible for. Job descriptions should be expressed categorically and unequivocally such that individuals know exactly what they are responsible for.

In conclusion, one must indicate that any good reward system must recognise effort, seniority, skills, performance and job requirements as determinants. Reward systems in education are still at a developing stage. Therefore, it is important to briefly outline practices that prevail in the corporate sector so as to see what attracts competent and excellent teachers to leave teaching to enter the corporate labour market. In that way we will be able to see what 'pushes' teachers out of teaching and 'pull' them to the corporate world.

2.4.4 Incentives in the private sector

Incentives are used extensively in the private sector, and the private sector experience is often cited as a rationale for instituting teacher incentives (NASSP, 1984:11). The compensation system used in the corporate sector is basically focussed on retention and motivation of employees. Hence Clardy (1996:80) states that :

"Were employers to ignore what the market is paying, they would soon discover either that they cannot keep employees because their rates are too low..."

There is a continued struggle to remain competitive in attracting and retaining highly motivated and performing employees (Dolenko, 1990:22). According to NASSP (1984:11-14) the private sector incentives are dichotomised into direct financial incentives, indirect financial incentives and nonfinancial incentives. Direct financial incentives include among others.

- Base pay;
- Merit increase in base pay;
- Bonus;
- Outright gifts;
- Stock bonus; and
- Profit sharing (Bottomley, 1983:96-100).

These incentives vary according levels of employees. For instance, company executives tend to be the ones to receive profit sharing incentives than lower level managers.

Indirect financial incentives refer supplemental executive benefits which include supplemented retirement plans, special insurance arrangements, and executive death benefits. This category of incentives also refers to perquisites, which include company cars, club memberships, financial counselling, and special travel arrangements. However, incentives for the blue-collar employees are limited if not squeezed.

Non-financial incentives refer to programmes that are used to enrich careers of individual employees. Selection for such programmes is typically perceived to be prestigious. Such programmes provide several incentives. First, they empower and develop employees. Second, they provide incentives to those not included in such programmes to achieve the level of performance necessary to be selected. Finally, they indicate to employees' prospects of career advancement. These programmes include:

- Cross-functional training;
- In-house education;
- Formal education;
- Career development programmes;
- Team projects;
- On-leave assignments and sabbaticals;
- Special recognition awards.

Recently most industries use dual career path model whereby employees have two career paths. They may grow into management path or may become professional masters within their line of operation. The latter model helps in retaining employees, is more flexible and recognises that higher performance in one's field does not necessarily mean one will perform higher in another level (especially in management).

However, Armstrong (1992:117-119) argues that rewards systems in the private sector have failed also due to:

- A change in business strategy whereby organisations who want to change the behaviour of employees in order to respond to changes in their markets and increased competition tended to focus on core businesses thereby resulting in devolution of accountabilities and stripping out of management layers, and major reviews of remuneration systems;
- A failure of job evaluation techniques – which are a means of establishing grades within an organisation and associated pay levels. As such the corporate sector also loses talented people as a result of inadequate promotion avenues and reward systems that create structural ceilings;
- The fragmentation of the labour market which adversely affected the companies. They are no longer able to rely upon a small number of external pay surveys in order to establish their salary scales. Many personnel departments manipulate the job evaluation system in order to provide salaries in line with those paid elsewhere;
- Companies relied on performance-related-pay system which failed because of poor communication;
- And there is an increasing recognition by most employees that they are deriving a poor return from the amount spent on their payrolls.

Finally, it is imperative to note that while the corporate world is perceived to be 'a bed of roses', everything about it may not be well. It has strong points and weak points like any other human creation existing in the world.

2.4.5 Career Paths and Recognition of Competence

2.4.5.1 *The teachers career*

The concept career is used in a number of different ways. In this project this concept will be used in the following ways, a combination of which will ultimately lead to the consideration of the model indicated in 2.3.4 (i.e. the dual career model). According to the Open University (1988:9) career should be seen as pattern of occupational moves – which first, refer to moves across occupations, and second, refer to moves of all kinds – both vertical and lateral within teaching; career should be seen as upward occupational mobility – which refers to the sequential movement up an occupational hierarchy; and lastly, career should be seen as sequence which involves passage through a number of stages each involving greater commitment.

There are a few inferences that can be made about teaching as a career. First, a career structure consists of the hierarchy of roles within teaching which can be clearly defined in differentiation and stratification. Differentiation involves a division of labour in which teaching and associated roles become progressively specialised. Stratification involves the ranking of these differentiated roles to give a hierarchy of status, power and remuneration. We can link differentiation with variations in function, and stratification with variations in status and rewards (Open University, 1988:9).

Second, a career pattern is the path followed by an individual teacher as he or she makes vertical and/or lateral career moves. Third, an individual's career is an evolving process. The process is contingent upon and shaped by a whole range of factors which include:

- The objective career structure;
- Knowledge and skills;
- Ambition;
- Reference groups; and
- Contingent factors.

Teaching as a career exists within the microcosm of social change. Changes in the teacher's role are derived from different sources, amongst others, teaching has become increasingly professional as changes in curriculum, pedagogy and the process of innovation depend on an extended professionalism, that is, a body of professional knowledge and skills beyond those used only in the classroom. And teachers are currently experiencing stringency in school expenditure and the basis of funding education and training has shifted to programmes that are more vocationally oriented, Mathematics, Science, technology and entrepreneurial nature. Therefore, it has become even more crucial to reconsider the teacher's career path – a model that recognises the teacher's competence and retains teacher's in their differentiated and stratified roles within the classroom.

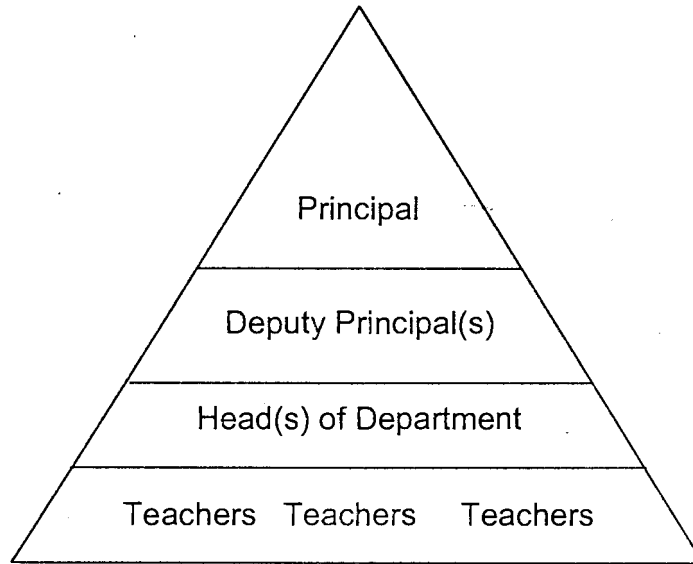
2.4.5.2 Career path model for the retention of teachers

The private sector model of incentives, which I have referred to earlier, makes provision for a dual career ladder. According to NASSP (1984:14) there is a clear parallel of the dual career ladder in the teaching profession. This model allows teachers to grow and develop while retaining their duties and responsibilities, hence NASSP (1984:14) confirms that this model

"Avoid the problem of coercing or enticing strong technical people to take on management responsibilities which may result in excellent technician and gaining a mediocre manager. A multi-ladder program is a useful tool for providing recognition for technical contributions and for preventing people from taking up management careers when ill-suited for them."

The benefits of this model cannot be overemphasised. But first, there is a need to visit the existing single – and pyramidal-model of career progression as shown in the figure below.

Figure 2.8 : Hierarchical Structure of Compensation



This model has some limited opportunities for teacher growth. Another weakness of this model is that it tends to assume that managing work and operational work are the same and does not require different competencies. The difference between the two is outlined by Van der Westhuizen (1991:50) who avers that:

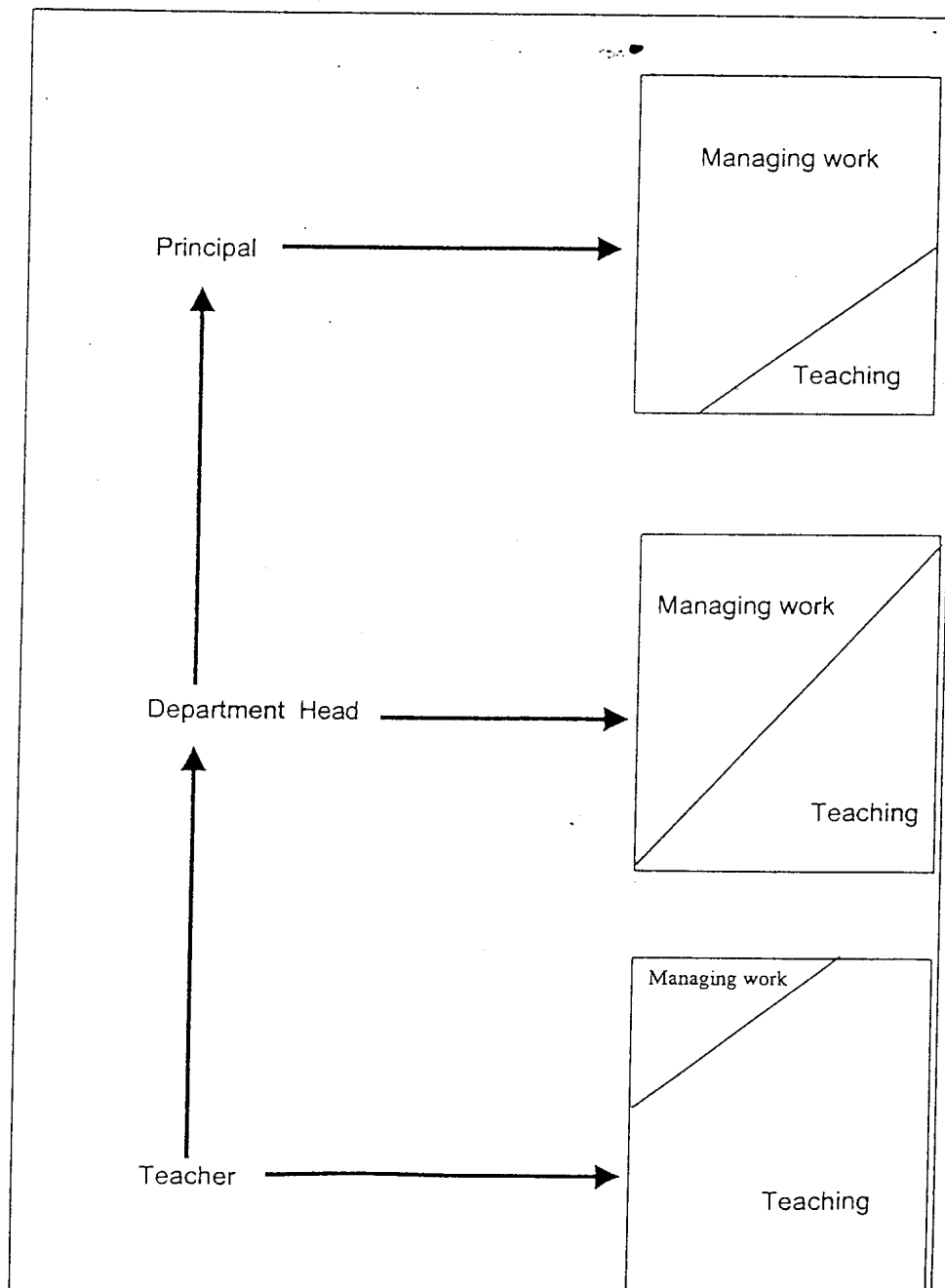
"Managing work and operating work differ with regard to nature, structure, aim, content and context. The fact that is a semantic relationship between the planning aspect in management and the planning aspect in operating work, does not make the two planning aspects the same or equal functions as the context and criticality of each activity differ fundamentally from each other".

Therefore, teaching (operating work) and principalship (managing work) are not parallel or the same although they are both geared towards effective and quality education. Each one does so in its own way, and yet related to each other. According Allen (1964) and Botes (1975) in Van der Westhuizen (1991:50) it is commonly practised in human resources management circles that excellent teachers and also performing teachers are promoted into managing work. The problem with this practice is that:

"as a person rises in the teaching hierarchy (is promoted), his operational work (teaching work) decreased proportionally as his managing work increases."

This deprives learners of the opportunity to be taught by excellent teachers. Paradoxically, this practice is perpetuated at the time when there is a dire need for such excellent teachers to restore the culture of teaching and learning. It raises questions such as: are our classrooms meant for average or even unperforming teachers? The answers which may be given prompts for an alternative model of recognition of competence. The figure below clearly shows how the pyramidal system reduces the promoted teacher's teaching work.

Figure 2.9: Managing work and teaching work in the school



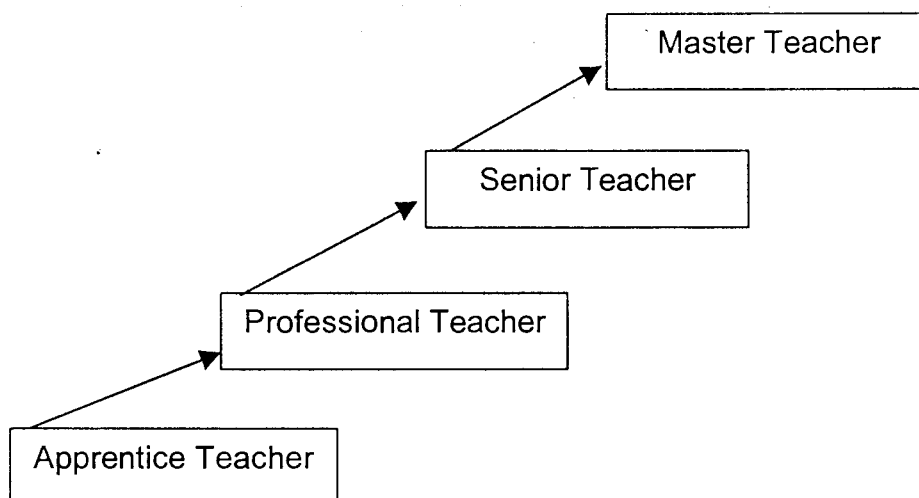
Source: Van der Westhuizen (1991:51)

In order to retain teachers in the classroom there is a need for competency-based compensation. The present practice is that jobs are paid not performance. People who hold those jobs just happen to get the salary assigned to that position. That assumption must change hence de Cenzo & Robbins (1996:368) argue that

"Rather than thinking of the job as the most critical aspect to the organisation," organisations should "view the people as an organisation's competitive advantage. When that conviction dominates, compensation programmes become one of rewarding competencies, or the skills, knowledge, behaviour employees possess."

It entails that rewards should be based on competence. Competency-based compensation programmes are premised on teachers' career stages model or what is commonly referred to as career ladders. This multi-career ladder approach provides significant recognition by peers that an individual contributor is successful in his or her career. Technical skills and expertise are retained in the classroom. Rebore (1991:245-248) and Steuteville-Brodinsky et al (1989:85) identifies the four stages as apprentice teacher, professional teacher, senior teacher and master teacher.

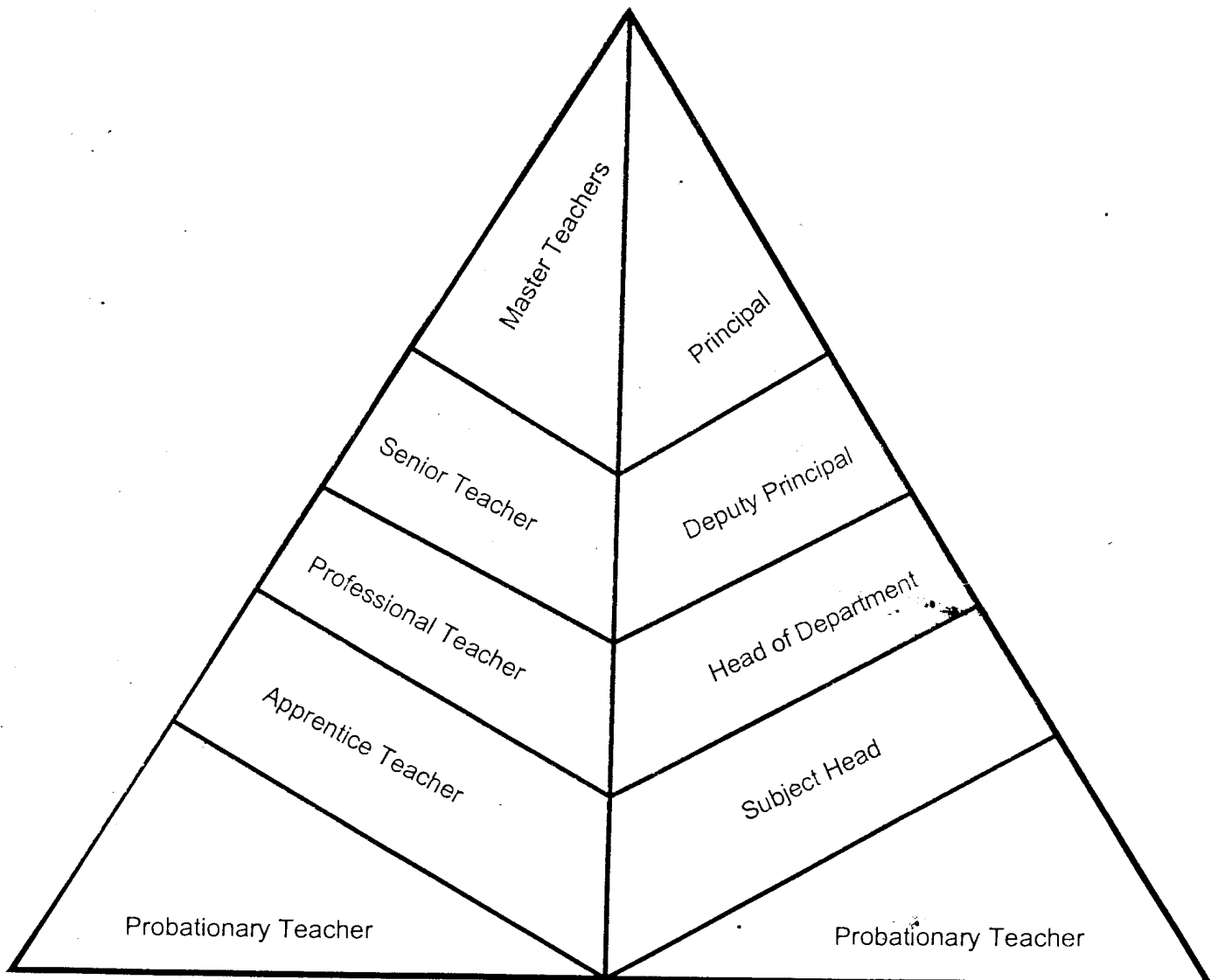
Figure 2.10: Career Paths for Teachers



Source: Maile (1998:198)

This model should be used in parallel with the one already outlined (figure 2.8), because this model is intended to exist side by side with the hierarchical model used for management jobs. Operational jobs reward structure is also hierarchical. The significance of this is that the level of growth for teachers becomes a process.

Figure 2.11: Dual Career Ladder



According to Steuteville-Brodinsky et al (1989:86) most states in USA use this model. The general principles applied to all these stages should be applied with caution because these career ladders may not produce the intended results if good teachers wait for too long to earn the additional benefits of the career ladder. The implication for this caveat is that a particular rung and regular performance appraisal are needed for teachers' mobility. Furthermore, as teachers move to each higher level on the career ladder their responsibilities and obligations increase. And their compensation should commensurate with their duties, responsibilities and obligations when they increase their compensation should also increase. Lastly, another requirement for career progression is additional education, and a consideration of equity imperatives. More details on the guidelines on how to implement this proposal will be dealt with in Chapter 5.

An evaluation of this model points out that it has both disadvantages and advantages. Possible advantages (NASSP, 1984:24) are:

- Opportunities to advance to higher levels within teaching may encourage superior teachers to remain and may attract strong candidates who believe that they have potential for advancement;
- Excellent teachers should be motivated by opportunities for advancement and variation in activities;
- Initial investment is reasonable;
- Additional resources reflect merit and support additional activities;
- Because part of reward is prestige, monetary requirements are lessened;
- Motivation and retention may be substantially improved if fully implemented;
- Structure lends itself to long-term multi-faceted appraisal, which may have greater reliability, validity and acceptance than annual appraisals;
- It may be one of the most effective ways of achieving the substantial changes required of fundamental operations;
- Add-on feature requires little fundamental change in district operations;
- Community can see more work for more money;
- Teachers may support emphasis on teacher development and longer-term performance appraisal;
- Teachers may appreciate change in activities.

On the other hand, dual career ladders models have possible disadvantages also. NASSP (1984:24) cites them as:

- Teachers who do not advance to higher levels may become discouraged;
- Potential teachers may be less attracted by long-term possibilities than by short-term rewards;
- Workload may increase lowering morale;
- Efforts may be directed away from the classroom;
- Morale may decline among teachers who do not advance;
- Long-term commitment is required;
- If many teachers advance, if additional responsibilities are many, or if rewards are large, the system may be costly;
- Available funds may be directed away from base salaries;
- If additional responsibilities are overemphasised, effects may be outside of the core teaching and learning goals;
- It is difficult to obtain short-term results;
- Initial implementation difficulties may exist;
- It requires considerable organisational change;
- Expanded support programmes may require substantial administrative work in development and execution;
- Teachers and community may not support use of time and funds for non-classroom activities;
- Shorter-term results may be desired.

2.4.5.3 Performance-related-pay

Performance-related-pay is referred to as performance incentives, that is, rewarding effective performance. It is exemplified by the use of commissions, piecework pay plans, incentive systems, group bonuses or merit pay (De Cenzo & Robbins, 1996:354). Performance-related-pay (PRP) is viewed with fears among teachers. They fear that PRP would affect their basic salary thereby

deflating their capacity to cope with the cost of living. But PRP would be a reward over teachers' basic pay and cost of living increase (Nxesi, 1997:35).

Performance problems are also raised. Hence, PRP remains a hot potato in the bargaining chamber. The organised teaching profession contends that PRP would be feasible when the playing fields are levelled. In the same breath, Nxesi (1997:35) argues that

"Many teachers under apartheid were not given the resources or managerial support to perform effectively. On the other hand, teachers in formerly white schools were given ample resources, and management support."

As such, teachers need to be developed first. It means that technicalities of implementing PRP should be scrutinised before implementation. However, the brief of PRP remains matching ability, potential and current performance with satisfactory rewards. It aims to retain employees, recognises their performance timelessly and attempt to equate it with their own sense of what is fair. (Tyson & York, 1996:179)

What is central to PRP is performance management. Clardy (1996:80) is of the view that managing teachers' performance requires appraisal of performance of employees. Their performance is rated and the reward is given. But this raises several questions such as:

- How much of a reward is necessary to stimulate extra effort?
- Does a typical employee, looking at a particular percentage difference, see enough of an increase between the two ratings (exceptional performance and acceptable performance) to warrant the extra effort required to earn an exceptional rating?
- In view of the inequality among teachers raised (Nxesi, 1997), is it wrong from an ethical point of view to apply an incentive programme for teachers' performance?
- What are the ethical issues that should be examined in the design and development of compensation programmes?

Answers to these questions will depend on the outcome of negotiations in the bargaining chamber. Negotiations are still in process. Appraisal instrument and performance incentives are yet to be developed. The debate revolves around the nature of the performance criteria, how performance against such criteria is assessed, and how is this assessment linked to pay? (Goss, 1994:91) According to Armstrong (1992:121-122) the impasse can be resolved if PRP can indicate:

- The type of payment to be given to excellent performers;
- The frequency of the payment;
- The methods of how payments under the scheme, should be related to performance – whether that or an individual, the group or the organisation as a whole or some combination thereof, and
- What is to be measured is important: should the measures be quantifiable or subjective, or perhaps a mixture of the two?

Like any other human creation PRP have the strengths and weaknesses. There is no evidence that performance improves in the long run purely due to performance –based pay. It seems to contradict Herzberg's theory on motivation. People are less likely to be motivated by money than they are by challenge, personal development, good supervision, feedback and a sense of achievement deriving from job accomplishment. NASSP (1984:18) and Tyson & York (1996:179-180) identify the advantages and disadvantages of performance-related-pay.

Possible advantages are:

- Opportunity to earn higher salary for superior performance may attract higher quality candidates;
- Monetary rewards for performance may improve morale and retention of superior teachers;
- Rewarded teachers are likely to be more highly motivated;
- Additional expenditures may be seen as justified if results are substantial;

- If fully implemented, adequately financed, and accepted by teachers, it may have among the strongest effects of all incentive plans;
- An effective performance appraisal system is required, which may support improvement and provide a basis for dismissing incompetent teachers;
- Teachers are rewarded for concentration on teaching; additional roles and responsibilities are not necessary;
- Some versions may be easier to administer than more complex structural changes;
- If appraisal system is sound, decision making is straightforward;
- Community will be supportive if plan attracts and retains better teachers and improves outcomes;
- Teachers will be supportive if plan accurately discriminates among levels of performance.

Possible disadvantages are:

- Some strong candidates and existing staff may dislike competitiveness of plan;
- Morale of unrewarded teachers may decline;
- Cost may be high if quotas are avoided, many teachers qualify, and rewards are sufficiently large to be seen as worthwhile;
- Performance appraisal may be expensive;
- Negative effects may outweigh positive effects if rewards are insufficient or if destructive competition and jealousy result;
- If insufficient time and resources are devoted to developing a strong appraisal system, the incentive plan may lose credibility and support;
- Development of an effective appraisal system is difficult;
- Significant attitudinal changes are required for acceptance;
- Emphasis on performance represents a large shift in many districts;
- Management of complex appraisal system can be demanding; much time is required;
- Community may be opposed if decisions are subjective, criteria are too narrow, and competition replaces collegiality.

Rewarding as a component of recognition of competence is a complex issue which requires more caution in its implementation. Guidelines and recommendations to be provided later will help address the implementation process. It should be considered that reward system should be flexible to consider the disadvantaged. A fair and equitable reward system will consider unique competencies of women, the disabled, and generally the previously disadvantaged groups and bring them on par with their counterparts. This will be discussed immediately.

2.5 PERTINENT ISSUES IN THE RECOGNITION OF COMPETENCE

2.5.5 Recognition of Competence and the Disadvantaged

The challenge to South African public education is to be both equal and excellent. Unless we seek equality, we undermine the possibility of achieving the excellence that comes when all teachers fulfil their teaching capacities. Unless we seek excellence, our notion of equality will be barren, for it will lack commitment to quality. Achieving equality and excellence involves providing opportunities for all so that each teacher can do his or her best, succeed at something worthwhile within the classroom, and take pride in that accomplishment.

The notion of equality for excellence conjures up mixed understandings. First, to others it has become a codeword for the reintroduction of discriminatory practices. Second, to others it means levelling of playing fields so that discriminatory barriers of the past are removed in order to allow the disadvantaged on board (Lazerson, McLaughlin, McPherson & Bailey, 1985:50). The clarion call for human resources management is to review the way recognition of competence has been carried out. Recognition of competence should be flexible and equitable. It must be characterised by anti-male biases and inclusiveness of the disabled. The imperative of equality should be seen as a process. Hence Lazerson et al (1985:54) caution managers that:

"We need to begin by recognising that equality is a conceptually and in implementation. If we acknowledge how problematic equality is, how much it depends on people's interests, motivations, and capacities, and how varied the ends of education are, it is hard to imagine a time when we say that we have achieved equality in education. To insist on establishing a unitary and fixed standard is to pursue a chimera that will only frustrate us, and probably further divide us, as we pursue egalitarian measures with ambiguous results."

Therefore, the focus of all efforts at achieving equality in education should be on learning – teacher development. The education and training of teachers should not be seen as having a fixed end. Education and training as mechanisms of acquisition of competence are marked by stages of growth. The more one learns, the more one acquires higher levels of competence. Equality is not static, it is also marked by growth. Because equality does not have fixed ends, but involves growth, it is guided by the following principles which informs the recognition of competence.

- Firstly, equality recognises different capabilities and different interests. Rather than being an attempt to make everyone the same, the commitment to equality acknowledges the range and variety of human capacities: intellectual skills, knowledge, attitudes, passion, creativity, experience, attributes, traits, self-esteem, etc. as personality resources that shape and influence reward systems.
- Secondly, teachers should not be victimised because of the race, gender, religious affiliation, creed, culture, language, marital status and geographic origin. Social, economic and educational conditions of teachers should be taken note of when recognising their competence.

What follows is the discussion of characteristics of equitable and fair recognition of competence.

2.5.5.3 Anti-male bias recognition

The issue to be discussed here is the recognition of competence of women. The aim is to probe current practices in human resources management. The following questions will help define the lines of discussion: What is the historical background of gender recognition problems? What prejudices and predilections are persistent enough to preclude women advancement? Are there discriminatory practices that hinder women ascendancy? Is there any significant difference between women managers and educators and men managers and educators? What are barriers to women advancement? And generally, is the reward system biased against women?

(a) Baggage from historical myths and cultural expectations

This paragraph explores traditional roadblocks to the advancement of women. In traditional African society there was a marked distinction in the roles of sexes. Men performed tasks such as hunting, livestock rearing and ploughing. Women's responsibilities included weeding, harvesting and threshing. In addition to their contribution to the production of food, women were responsible for the bulk of so-called domestic work. This points out the obvious disproportionate division of labour in the traditional African society (Letsoalo, 1986:225). In that way, perceptions and attitudes of employers were adversely affected. For instance, men were viewed as 'breadwinners' and women were regarded as 'belonging to the kitchen'. As such, the legal status of women in careers was that of a minor and subordinate to their superiors (men). In employment women were regarded as temporary employees, less willing to be transferred, they may be 'tied down' by marriage and pregnancy.

Such perceptions affected the way women were and/are compensated at workplace. For example, the 1914 Income Tax Act stipulated that :

"... any income received by or accrued to or in favour of a women married with without community of property and not separated from her husband under a judicial order or written agreement of separation, shall be deemed to be income accrued to her husband."

This legislative provision placed women in a dependent and subordinate position. According to Robinson (1997:5) although there is a slight improvement on the compensation system such that one can say there is parity, the advancement of women remain minimal and one can conversely say that women occupy lower levels of the career ladder.

(b) Discrimination

The socialisation of roles and male preponderance in workplaces ramified even in the reward systems used in employment. Patriarchal perspectives were and/are used. This resulted in a situation whereby women are regarded as not suited for managerial jobs or promotions. As such recognition of competence reflected patriarchy which is embedded in subtle perceptions connecting service conditions to general public predispositions (Giddens, 1993:173). As a result of such perceptions job stratifications discriminated against women. Wilson (1997:1) concur to this when saying that:

"few professions have readily welcomed women. Only in the relatively liberal era of the late twentieth century has membership of many professions become accepted and normal. But education is of all the learned professions the one which had been most open to women."

The last statement is congenial to the fact that women form a majority in teaching, and are generally a majority in the population. Teaching represents one of the most feminised of all professions. Yet women are invisible in higher levels of education management. At school level, women are less represented in the higher job levels. Few core heads of departments, less number of them are deputy principals or even principals. Why is it so? Is it because they are less capable and incompetent? Answers to these questions evoke the traditional perceptions I have referred to earlier. Traditional perceptions are used in promotions. Generally, the criteria used in recruitment and selection process reflect traditional perceptions as well. Selectors are predominantly male. This polarises job roles. Job descriptions are defined in male characteristics – women are seen as supportive, subordinate, material and caring, while men are treated

as leaders, heads and active members who are to deal with problem students. (Open University, 1988:37)

Such as stereotypic and prejudiced approach discriminates against women. If it is upheld, it means that women have to simulate, imitate and mimic male characteristics in order to succeed. Promotions should not be defined through masculine characteristics because this would result in vertical discrimination of women. Vertical discrimination is discernible in inference such as:

- Women manager are excellent in dealing with girls' discipline;
- Women can amicably handle the social side of the school;
- Assertiveness is not a behaviour into which women have been socialised.

It is a myth that (Shakeshaft in Open University, 1988:38) women are more likely than men to enjoy doing routine tasks; to not set long range goals or work towards them; to want less responsibility; to be home rather than job oriented; to be more sensitive to criticism; to be less aggressive than males; to be less likely to stand up under fire; to be less independent and self-sufficient; to cry more easily; to be unable to understand financial matters; and not to be able to negotiate contracts. These attitudes are based on practices or act of making distinctions between people based on unfounded assumptions, biases, stereotypes, prejudices and even skewed prescriptions. And result in:

- Unequal hiring standards;
- Unequal opportunities for training and retraining;
- Unequal pay for equal work, let alone for work of equal value;
- Occupational segregation;
- Labour status segregation;
- Unequal promotion opportunities, and
- Unequal vulnerability to retrenchment (Mitchell & Correa, 1997:86).

As I have mentioned earlier that discrimination is perpetuated in recruitment and selection procedures, fair competition demands that each person has an opportunity to match her or his skills and abilities to real requirements of the job.

It is not fair to have a criterion that relates to an applicant's marital status, gender, race, culture, religion, language, pregnancy, sexual orientation etc. (Department of Education, 1997:207). More details on maintaining fairness in recruitment and selection have already been discussed in section 2.3.2, and the guidelines in chapter five will elaborate further.

Discrimination in the South African labour relations was deeply entrenched as reflected in the Bantu Education Act of 1954 which avers that:

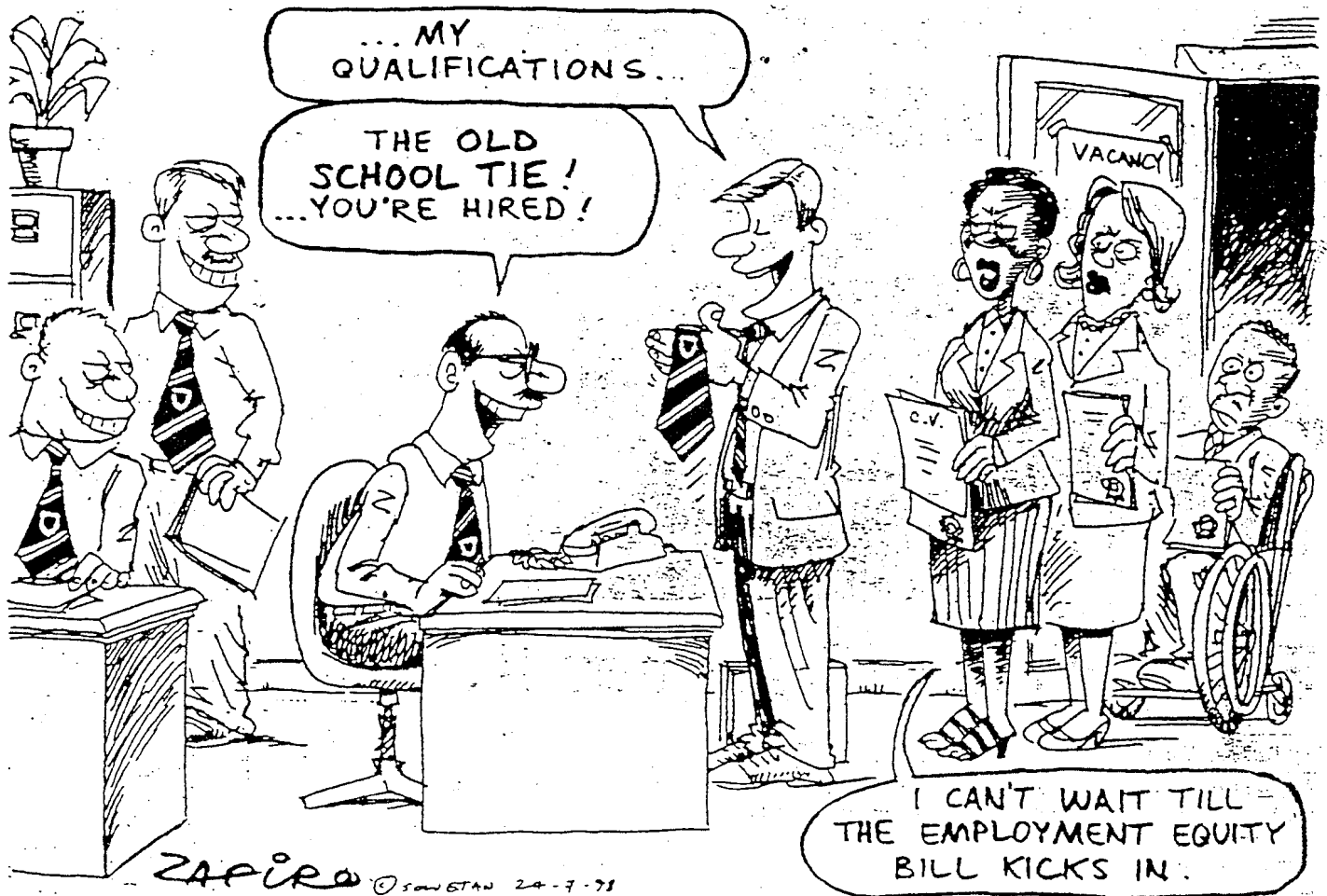
"As a women is by nature so much fitted for handling children, and as the great majority of Bantu children are to be found in lower classes of primary schools, it follows that there should be far more female than male teachers. The department will therefore ... declare the assistant posts in ... primary schools to be female teachers' posts ... Quotas will be laid down at training schools as regards numbers of males and female candidates respectively which may be allowed to enter for the courses ..."

Thus, women teachers were discriminated against in career advancement. They were also made to remain in subordinate positions. Hence it is still largely held that:

- Women do not want promotion and responsibility;
- Women teachers aren't promoted because they are less well qualified than their male colleagues;
- Women do not have the same number of years of experience as men;
- Women no sooner enter the profession than they leave to have babies;
- Women are absent from work more than men;
- Men are the breadwinners, therefore they should have the promotion, and
- Men are better teachers and pupils prefer male teachers.

These myths contributed adversely against advancement of women. Competence is not gender oriented. Skills, expertise, qualifications and experience are not the gifts of a particular gender. All people – men and women are talented in one way or the other. Therefore, what counts should be competence not sexual orientations of individuals. The figure below alludes to the above mental constructs prevailing in the recruitment and selection system.

Figure 2.12: Discrimination in Recruitment and Selection



Adapted from: Sowetan Friday, July 24, (1998).

(c) Women as managers – their skills and management styles

Research prompted by gender discrimination in education management reveals that there is a remarkable difference in the way women managers carry out their tasks. The differences emerge from the fact that "women are taught from childhood to accommodate men. At the same time, men are taught they will be accommodated to. Men expect to be understood and women work to understand. Detachment and defensiveness become masculine tools for control, when confronted with women's assertiveness and resistance to being purely

accommodating." (Hall, 1996:180) This is what Giddens (1993:165) calls gender socialisation whereby gender differences develop from the mothers-infant interaction. From birth girls and boys are treated differently. Gender socialisation is further enforced by social institutions such as the church and the school. Implying that when entering the job market men and women have different predispositions with regard to their job roles. The weaknesses with this inference is to suggest that men are a homogeneous group, and women as well. Such generalisation is reflected Ozga (1993:11) who concludes that :

"Women's leadership style is less hierarchical and more democratic. Women, for example, run more closely knit schools than do men, communicate better with teachers. They use different, less dominating, body language and different language and procedures. Women appear more flexible and sensitive, and often more successful ... women spent less time on deskwork than men, visit more classrooms, keep up to date on curricular issues, spent more time with their peers and sponsor other women. Their language is more hesitant and tentative, their agendas more informal and flexible, there is less distance from subordinates."

Other generalisations include that women are emphasising cohesiveness, are less individualistic, do not engage in displays of anger as control mechanisms and are highly valued by others (their colleagues) on the other hand. On the other hand, men are perceived to be militaristic in their management styles. They are generalised to be aggressive, impulsive and less sensitive and considerate than women. Hence, Giddens (1993:364) concludes that:

"The male element is a destructive force, stern, selfish, aggrandising, loving conflict, conquest, acquisition, breeding in the material and moral alike discord, disorder and demotivate ... The male element has held high carnival thus far, it has fairly run riot from the beginning, overpowering the feminine element everywhere, crushing out the diviner qualities in human nature."

While one agrees that women have been disadvantaged in employment, and that what is termed a good manager is viewed in male perspectives, one does not agree that all males are subscribing to the above character traits and that all women attribute a model management styles. It will be unscientific to conclude and generalise on traditional and popular sentiments. Neither do I trivialise

findings of other scientists. I refute these generalisation because of their superficialness, simplicity and lack of illumination (Landman, 1998:60-72).

However, if women are taught from childhood to accommodate men (and the heads' biographics testified to the importance of the father's approval), it follows that, when women become leaders, they have either to unlearn those accommodating characteristics (where they are conscious of them) or they may use them as powerful weapons in bringing about desired behaviour (Hall, 1996:181).

In conclusion one can say that in the same way as women are not a homogeneous group, men managers are also not a homogeneous group and may operate using a variety of styles depending on the various situations in which they find themselves. Many women, in order to succeed in male environments, are forced to adopt the hegemonic *modus operandi*. While there are very different leadership and management styles, women have often been associated with particular management styles. This is wrong because any one style cannot be neatly defined as being totally male or totally female.

2.5.5.4 Recognition of competence for the disabled

The term disabled has been largely conceived in term of the broad concept of disadvantaged. The latter concept emerge as a result of discrimination and exploitation (Cashmore, 1988:78). According to National Commission on Special Needs in Education and Training (NCSNET) and National Committee For Education Support Services (NCESS) (1997:95) the term disadvantaged embraces people with disabilities, behavioural difficulties, underqualified, underdeveloped, etc. For the purpose of this discussion, the disabled will refer to the physically handicapped, underqualified educators and educators with HIV/AIDS. These individuals pose a serious challenge to managers because of their deeply rooted challenges.

(a) Employment of the disadvantaged

For reasons that have deep and enduring cultural roots, the above mentioned categories of the disabled bear or suffer from some social stigma, to the extent that they are at a disadvantage in competing for various types of employment. However, it must be acknowledged that their employment, as it is commonly held, create human problems both for the system and for the individual. They need specialised organisational consideration. In addition to the typical processes applicable to all personnel, there are complex problems involved in employing people from the disabled groups (Casterter, 1992:137). These include ways of increasing employment opportunities of these groups, improving their skills, attitudes, and abilities through continuing education and development; providing upward mobility into positions of status and responsibility; and integrating interests of the individual with the organisation and the work of other groups within the system to which they relate. These entails that human resources managers should devise remedies for employment of the disabled.

(b) Human resources management remedies

The priority of human resources managers, in terms of employment of the disabled, should be to strike the balance in recruitment efforts so that discrimination is rooted out, and using a criteria for selection, promotion and recognition that do not violate civil rights of individuals directly or indirectly by including job characteristics which discriminate on the basis of race, gender, sex, ethnic or social origin, colour, sexual orientation, age, disabilities, religion, conscience, belief, family responsibility (Anderson & Van Wyk, 1997:23). This should direct, prescribe and regulate:

- Employment policy;
- Human resources planning;
- Recruitment process;
- Selection process, and
- Development process.

Other remedial actions include reasonable accommodation. According to Rebore (1991:50) it include providing employee facilities that are readily accessible to and usable by disabled persons; taking action such as restructuring of jobs, modifying work schedules, modifying and/or acquiring special devices, and providing readers.

Employment criteria should be reviewed. Employers should refrain from testing or screening out applicants unless that test or selection criteria is proven to be job related. Therefore, in selecting and administering tests to an applicant or employee with a handicap, the test results must accurately reflect the individual's job skills or other factors the test purports to measure rather than the person's disabilities, except when these skills are required for successful job performance. According to Rebore (1991:50) the term test includes measures of general intelligence, mental ability, learning ability, specific intellectual ability, mechanical and clerical aptitudes, dexterity and co-ordination, knowledge, proficiency, attitudes, personality, and temperament. Formal techniques of assessing job suitability that field qualifying criteria include specific personal history and background data, specific educational or work history, scored interviews, and scored application forms. Guidelines provided in Employment Equity Act, Employment of Educators Act and Labour Relations Act should be taken lid of.

Pre-employment enquiries may be made to prepare the organisation according to particular conditions of the candidate. The aim is to prepare the implementation of remedial, voluntary or affirmative action programs. Matters such as creating ramps into entries to buildings need such a remedial action, and job descriptions which are well suited to the conditions of the applicant may be derived. Although health conditions are to be considered, it does not mean that managers must compel candidates to take health tests.

In conclusion, it can be stated any remedial effort taken should circumvent any distinction, exclusion or preference made on the basis of race, colour, sex, religion, political opinion, national extraction or social origin, which has the nullifying or impairing equality of opportunity or treatment in employment and occupation. And it must be emphasised that any distinction, exclusion or

preference in respect of particular job based on the requirements thereof shall not be deemed to be discrimination (Du Plessis, Fouché, Jordaan & Van Wyk, 1994:322; De Waal, Currie & Erasmus, 1999:211-215).

(c) Considerations for managing the marginal teacher

The paradox with regard to the employment of the marginal teacher (disabled) is that while management may be accommodative, the challenge of quality public education remain a vexing problem. The following questions may help in the development of an equitable recruitment and selection programme:

- Is the teacher technically efficient?
 - What bureaucratic measures exist in form of performance criteria, curriculum needs and classroom requirements?
 - Does the teacher conform ethically to the standards of conduct applicable to the teaching profession?
 - What will be the projected level of performance in regard to quality?
 - Is his/her personality balanced to meet the average needs of the school?
- (Frase, 1992:56-57)

However, emphasis on competence should not serve to preclude advancement of the disabled. Management must not fall into a trap of creating "mending walls" by attempting to rethink their recruitment and selection policies in terms of the much needed competence to produce quality. If there is anything that does not need a 'wall' that will be transformation. Managing organisational transformation cannot be equated with such objective phenomena as planets and stars. Rather, organisations are social inventions, which humans construe in diverse ways. Organisations do not think, choose or act as theories claim; rather individuals do. Nor are organisations regulated by scientific laws, rather, they are guided by human intentions and decisions (Donmeyer, Imber & Scheurich, 1995:50). In that way the final reality of human resources management is not found solely in books, nor in scientific approaches, nor in scientific theories alone but in the minds of those engaged in directing educational activities as well. Scientific approaches and theories should be blended with one's creativity and innovation.

2.5.6 Organisational Management and Recognition of Competence

2.5.2.1 *The work satisfaction of teachers*

One important aspect of recognition of competence is employee satisfaction. Satisfaction is associated with motivation. The recognition of competence is thus one of the principles of motivation because, according to Van der Westhuizen (1991:203), if a person receives the necessary recognition he or she is inclined to work harder. Earned recognition brings a feeling of satisfaction and should not be in the form of false flattery. Criticism should also not be levelled immediately after giving positive recognition. Carnegie (1981:211) alludes that people are positive to leaders who criticise with sincerity, and do not couple the criticism with denotative admonishes. The work satisfaction of teachers is a complex matter. It is achieved when many factors come to interplay. That is to say, it is a matter that is achieved when teachers are immersed in numerous factors. Therefore, monetary compensation alone cannot motivate and maintain teachers' satisfaction.

(a) Motivation theories

Motivation has been an aspect of research by many scientists puzzled by what really prompts people to work harder – what sets people in motion and which spark ignites and influences the course of human action. Their curiosity was sharpened by questions such: Are people working voluntarily? Is a leader necessary to encourage staff to willingly achieve to the best of their abilities? Which needs initiate behaviour and actions in people?

Education management literature indicates that various theories of motivation relate to both intrinsic and extrinsic motivations. Among them, the following shall be cited as examples:

- Maslow's hierarchy of needs;
- McGregor's theory X and theory Y;
- Drucker's theory Z;

- Herzberg's two factor theory;
- McClelland's theory of self-realisation (Van der Westhuizen, 1991:195-202).

Research in the field of motivation is still vague and speculative, because people constantly change as they grow older and each is a unique being (Van der Westhuizen, 1991:195); Open University, 1988:13). Furthermore, motivation depends on the philosophy of life and religious convictions.

(b) Motivational factors

Motivation is influenced by factors in education. The needs of every person should be taken into account, such as the need for recognition, the need to achieve, be an authority figure, value systems and friendships. Therefore, if teachers are threatened with redeployment and retrenchment, their need for job security is threatened as well. The limited opportunities for career advancement does not augur well for teacher's needs for self-actualisation. Non-recognition is demotivating in itself. Because teachers derive their satisfaction from teaching as such, it is important that monotonous and routine work be regularly reviewed. This begs several questions: Does it mean that schools should make changes 'now and then' in order to keep teachers constantly interested? Will regular change not frustrate and confuse the very same whose interest is solicited? How long are teachers' interests going to last? Is change alone a motivational factor?

Answers to these questions points to a holistic approach to motivation. Management factors also motivates teachers (Van der Westhuizen, 1991:204). Positive interpersonal relationships are regarded as strengthening motivation. How the manager communicates with teachers is motivating in itself. If teachers know what is expected of them, they will perform their tasks with enthusiasm. The manager's management styles also help motivate teachers. For instance if he or she uses joint-decision making, participative management he or she is likely to earn teachers motivation.

Lastly, the community relations serve to motivate teachers. If community's values (religious, economic, cultural, political or social) differ from those of the teacher, these community factors will have demotivating effect on the teacher (Van der Westhuizen, 1991:204).

Therefore it would seem that to motivate teachers, the educational manager should have knowledge of the needs of people, their work circumstances, the requirements of the community and effective management style as well as effective communication.

(c) Implications of motivation on educational managers

- (i) Ensures participation of staff in school activities.
- (ii) Gives recognition to staff.
- (iii) Delegating should be linked to giving authority.
- (iv) Motivation considers that each person is unique with attendant physical and spiritual needs.
- (v) Motivation requires knowledge of human nature.
- (vi) Allows a person to feel useful.
- (vii) Does not damage a person's feelings of selfworth.
- (viii) Ensures adequate channels of communication.

(d) Motivation as modification of behaviour

Behaviour modification as an aid to motivation can be a problem if managers do not seek to understand behaviour. Keetan (1996:5) reiterates this aversion when stating that:

"Understanding behaviour can be a bit of a problem. The main way people judge others is by observing their behaviour and coming to conclusions. But this is somewhat akin to judging the extent of an iceberg by its tip. As everyone knows, 90% of its structure is hidden beneath the surface. No-one knows exactly what is lurking in the ocean depths."

It seems that the behaviour that occasions most interest is problem behaviour. When people are behaving well, there is no necessity to explore the reasons for their behaviour. But when they are not, it forms a subject of endless speculation. Because I have stated that understanding behaviour is an aspect of motivation that leads to behaviour motivation, it is necessary to define what is behaviour modification in the light argument raised by Keeten (1996).

"Behavioural modification ... is an attempt to change the behaviour of an individual who has misbehaved by changing the response of the person(s) who are reacting to the misbehaviour." (Gorton (1996) in Van der Westhuizen, 1991:297)

Behaviour modification refers to those techniques or methods which can be used to control and change behaviour. The assumption is that all behaviour is learnt and a person will continue to evince a particular type of behaviour simply because it is strengthened. Behaviour is either strengthened negatively or positively depending on the understanding of the vigilant and observant manager. What is fundamental is to understand what might be the cause of certain behaviours. It requires the ability to make a distinction between what you actually observe and what you infer from your observations. In the same vein, Keetan (1996:9) classifies behaviour according to:

- Basic behaviour – innate, temperament and learned behaviour;
- Distressed behaviour – exhibited in adverse circumstances;
- Needful behaviour – reflects people's deepest emotional needs.

Therefore, it seems that if managers are to modify behaviour of their staff, they need to understand objectively and holistically aspects of a human being. People cannot be judged on one aspect only, their behaviour cannot be separated from their personalities, and the environment in which they work cannot be separated from their behaviour. Thus, it is necessary to establish whether people know what they are rather than unintentionally. The techniques and methods to be used for behaviour modification will depend on such understandings.

2.5.2.2 *Management as a potential source of demotivation*

(a) Management styles

Management is generally regarded as a potential source of dissatisfaction. Conflicts often arise as a result of management and leadership styles. According to the Open University (1988:14) there is an inherent conflict between organisation and professionalism. A balance between the two principles is difficult to achieve and any substantial imbalance increases dissatisfaction. When managers over-manage, meddle and get in the way of teachers, dissatisfaction increases. Organisations cannot be changed by a heavy hand. Management styles such as autocratic and bureaucratic styles create stringent measures whereby teachers' freedom to perform their tasks with less intervention is precluded.

Therefore, there is a close link between the teachers' satisfaction with management styles. There is a need to strike a balance between competing tasks. This requires changing of perceptions of management. Marais and Bondesio in Garbers (1996:114) are of the opinion that management should be regarded as an environment in which individuals, working together in groups, efficiently accomplish selected aims through planning, organising, guidance and control. However, this aversion may seem inadequate and not concrete if management is equated to leadership. Management is different and yet complementary to leadership. Leadership is an attempt at influencing the activities of followers through communication process and toward the attainment of some goal(s). Personal qualities, individual behaviour and situational circumstances when blended together produce effective leadership which will impact on teachers' satisfaction.

Institutionally, the role of the leader and manager is crucial in the matter of satisfaction. Teachers have different expectations of heads and satisfaction will be enhanced, or dissatisfaction minimised, where there is a fit between expectations and behaviour (Open University, 1988:14). Broadly speaking, teacher satisfaction is highest where a head teacher has clear professional goals,

gives professional leadership, is seen to be active and is concerned with the welfare of his or her colleagues.

Sources of dissatisfaction emanating from the head are numerous and varied but include disengagement, passivity, confusion over purposes, the establishment of routines and procedures that hinder through lack of clarity, changeability, inauthenticity, and lack of consultation. One particular aspect of school organisation and management that cause conflicts in schools is teacher participation in decision making. Very often managers overlook teachers. Satisfaction results from the fit between desired participation and actual participation on specific issues.

(b) Group dynamics

In this factor there is a tendency among certain members of the staff to have implicit or explicit understanding that they will support each other whatever the rights and wrongs of a particular issue. Clique forming is the order of the day (Everard & Morris, 1990:70). Very often this is caused by selective and inconsistent support by managers whereby they identify themselves with a particular group. And this problem is exacerbated by failure to listen on the side of the management. Group formations can be disastrous when viewed negatively.

But positive formations such as subject committees, staff, social clubs, governing bodies and learner groups are encouraged. Competition between groups should be handled with proper care because it may degenerate into rivalry. (Van der Westhuizen, 1991:300)

(c) Change

The way managers handle change can be a potential source of dissatisfaction as well. For instance, change in personnel matters may cause conflict when, for example, policies and circumstantial factors are not considered in staff reduction and retention. Implementation of policy changes which is done without a

preliminary reconnaissance, identification of goals and objectives and careful weighting of alternatives may cause immense problems to the school.

A fundamental source of dissatisfaction is that professional people want to control their professional lives. It means that teachers as professionals want to determine the policy which steers change in their professional lives (Badenhorst, 1987:14). It stands to reason that if the teacher is recognised as a professional person he can also expect to be consulted in policy matters. Where change is to be effected on their 'sphere of influence', teachers tend to regard policy as matters of macro- and meso-level authorities only. Stakeholders at micro-level are very important (ANC, 1995:7). In a democratic environment change should be regarded as a process guided by decisiveness and yet be flexible and adaptable.

2.5.2.3 Career success

Career is an important element of job satisfaction in two ways. One is that ideally career moves entail at least a maintenance if not an actual increase in job satisfaction, which may occur as greater responsibility yields greater satisfaction. But since career in teaching tend to lead out of classroom – the major locus of satisfaction – and into administration, some adjustment in the teacher's source of satisfaction needs to be made and not all promoted teachers make this adjustment. The other is that career success is a source of satisfaction in that it represents a recognition of one's professional worth. But by the same token, lack of expected promotion is also the source of the sense of one's lack of conception of worth. Satisfaction is an outcome of the fit between one's conception of worth and the expectation of the system in terms of promotion (Open University, 1988:14).

One of the major sources of dissatisfaction in teaching is the sense that others of less worth are outstripping one in the career structure. The problem is exacerbated in teaching by the fact that the criteria of effectiveness are not taken as indicators of teaching quality. There are two aspects of success: Most surveys of teachers' attitudes to promotion, as one element of recognition,

indicate a widespread belief that is related to the fact that successful teaching does not necessarily lead to a successful career and a successful career is not evidence of successful teaching. (Open University, 1988:15)

2.5.2.4 *Teacher unrest*

Widespread dissatisfaction among the teaching corps is indicative of the fact that all is not well in the education system. When teachers choose to leave the classroom to give vent to their frustrations and grievances through marches, strikes and sit-ins it is usually a statement about a greater malaise afflicting labour relations. Govender (1996:55-58) probed the issue of teacher unrest and find that there is proliferation of militancy among teachers because of:

(a) School conditions characterised by

- Overcrowded classroom;
- Shortage of books;
- Poorly equipped schools;
- High pupil-teacher ratios;
- Lack of qualified teachers;
- Shortage of teachers;
- Shortage of learning materials, and
- Shortage of schools.

(b) Service conditions impounded by

- Work-book system;
- Teacher evaluation instruments;
- Inspector's role in evaluating;
- Retrenchments;
- Discrimination against women;
- Recruitment and selection procedures, and
- Long working hours.

(c) Salaries described in terms of

- Meagre salary increases;
- Insufficient living wages;
- Salary parity for women, and
- No work no pay.

Teacher unrest, described as militancy, increase as a result of deficiencies mentioned above. These deficiencies imply that elements which make up the entire recognition system have been ignored, and are scanty. It remains a nemesis in the education system. Pienaar (1986:5, 32, 35, 43, 50, 177, 130) maintains that teacher's salaries and conditions of service had always been a source of dissatisfaction. In some cases teachers' anger has been provoked by the system itself when failing to recognise teachers' competence, discriminating on racial lines and gender in the reward systems. As a result the conditions deteriorated further when teachers were overloaded.

However, there is a misconception that must be dispelled with regard to teachers' demands. When teachers want a reasonable teacher-pupil ratio, they want manageable classroom whereby learners can benefit and receive effective and quality education. When teachers march to demand for more books, more appointments, increased learning and teaching materials and more classrooms, they seem to articulate learners and community needs and aspirations of an equitable education. It is not selfish of teachers to want increases in their salaries because a hungry teacher cannot teach. Therefore it can be argued that the problem with the techniques and methods used to express frustrations and dissatisfaction are self-defeating to the restoration of the culture of teaching and learning. Although the responsibility for the creation of quality education rests with all stakeholders, the employer's responsibilities stands at the apex of the pyramid. The employer should:

- Create a broad framework for determination and development of policy;
- Establish management and consultative structures that will develop programmes for quality education;
- Provide democratic, equitable and fair education services;
- Narrow the gap between racial and gender disparities in education management;
- Inflate conditions of service (Nxesi, 1998:6-7; Bondesio, Beckmann, Oosthuizen, Prinsloo & Van Wyk, 1989:23; Oosthuizen, 1998:151-154).

2.6 CONCLUSION

It can be concluded that recognition of competence does not begin when a teacher takes on employment. For reasons alluded in this chapter it begins when a candidate is given admission to teacher education and training institutions. His or her competence is recognised right from initial training and continued upon appointment, although the methods used for recognition are different. The difference does not signify any degree of importance of each stage but a variation used according to the constraints of each level.

In this chapter, mention has been made to new approaches to recognition of competence in human resource management. Therefore, these new approaches, as expressed in the National Qualifications Framework (NQF), are in the process of being implemented or are implemented. Hence the context of writing and arguing was done in the future tense. Furthermore, the reader should not be confused by the use of the concepts teacher and educator, learner and student, manager, leader and principal. They refer to one thing in each case.

The researcher has highlighted areas of weaknesses in existing researches made in the field of education management. For example, reference is made to the inadequacy of existing career ladder and explored the tentative model of dual career ladder used in some countries overseas. However, local constraints are highlighted in each model, and each model of compensation is evaluated by indicating its pros and cons. A consideration of local constraints was further unfolded when unravelling pertinent issues which impact on recognition of

competence. Although this chapter may be elaborate, crucial factors related to recognition of competence were not covered entirely. And finally, motivational theories, factors and implications were probed with view to organisational management.

In the next chapter the researcher shall continue to refer to issues raised in this chapter. Therefore, empowerment and capacity building should be regarded as complimentary elements of recognition of competence.