

**Perspectives held by teacher union representatives and
principals of educator promotion interviews**

by

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Declaration

I, James Mhlongo student number 29742634 hereby declare that this dissertation, ***“Perspectives held by teacher union representatives and principals of educator promotion interviews”*** is submitted in accordance with the requirements for the Magister Educationis degree at University of Pretoria, is my own original work and has not previously been submitted to any other institution of higher learning. All sources cited or quoted in this research study are indicated and acknowledged with a comprehensive list of references.

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James Mhlongo

May 2017

Dedication

I dedicate this qualitative research to my beloved parents: my mother, Anna Mhlongo, and my late father, Boy Butana Mhlongo, who brought me up in accordance with Jehovah's holy laws and standards. They sacrificed everything in order for me and my siblings to achieve excellence in our chosen fields.

I further want to dedicate this research that has opened my eyes to my late cousin, Zephaniah Sombili, an eloquent speaker, a loyal cadre and humble servant of the people; my beautiful wife, Idah Mhlongo, who has supported me through thin and thick; and, last but not least, my two cute children, Anthony Sithembiso Mhlongo and Antoinette Bongwiwe Mhlongo, a bundle of joy. They are a source of inspiration in my life and have encouraged me to achieve the best in my chosen field.

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Abstract

This study explored the perspectives of the representatives of teacher unions and school principals in the process of promotion of educators. The study aimed at highlighting how the representatives of teacher unions and principals understand their role in the promotion interview process, the challenges experienced and the factors they considered when recommending educators for promotion. This qualitative case study focused on one district in Mpumalanga Province. Data were generated through semi-structured interviews with two representatives of a teacher union and three school principals. The representatives of the teacher union comprised a branch secretary and a site steward. This study found that the principals performed their role in promotion interviews as stipulated in the Employment of Educators' Act of 1998; however, they were skeptical about the activities of the union representatives who are tasked with the prescribed role of observer. Representatives of the teacher union felt that their role extended beyond that of passive observer during the promotion interview. There was evidence of lack of trust and a power struggle between the principals and the representatives of the teacher union which affected their relationship during and after the interview process. While the principals appeared capable of managing the interviews, the activities of the union representatives shaped the process and the outcome of the selection process. This study also found that although all participants mentioned academic qualifications, subject specialization, good communication skills, sound human relations and managerial skills as factors to consider when recommending teachers for promotion, possible nepotism threatened fair procedures during the promotion interview process.

Keywords: Role, Principals, Promotion interview process, Representatives of Teacher Unions, Challenges.

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CHAPTER ONE

INTRODUCTION

1.1 Introduction

This qualitative study deals with the perspectives of the representatives of teacher unions and of principals of the interview process conducted for the promotion of teachers in Mpumalanga Province. The study is inspired by earlier studies on the role of teacher unions on teacher promotion. Zengele (2013) focused on the involvement of unions in the filling of promotional posts through interviewing teacher unionists on their views on teacher promotion. Ramokgotswa (2015) also explored the role of teacher unions in the appointment and promotion of teachers concentrating on the role of stakeholders mainly members of school governing body in the process. In contrast to the previous research, this study has focused exclusively on the perspectives of the principals in comparison with that of the teacher union representatives during the interview process for teacher promotion. The researcher explored how the principals and representatives of teacher unions understood their roles during the interview process; their views regarding the recommendation of teachers for promotion; and the challenges experienced by the principals and representatives of teacher unions during the interview process for promotion.

1.2 Background to the study

According to the history of unionism in South Africa, the first black teachers' union, the Native Educational Association, was established in 1879 (Govender, 2011). The Native Educational Association teacher unions aimed at addressing labour conditions (Wood, 2009). The association was established to address educational issues as well as social and political matters. The black unions paid special attention to many unsatisfactory conditions which came about as a result of the Bantu Education Act of 1953 and other apartheid legislation (Burrows, 2009; Moll, 2011; Maile, 2010). The purpose of the teacher unions, especially black unions, was to fight for the rights of teachers, to oppose the implementation of the Bantu Education Act of 1953 and to pursue the interests of African teachers, for example, the abolishment of pass laws (Burrows, 2009). Teacher unions played a pivotal role in drafting and adopting the Code of Conduct and the Code of Ethics

that were distributed to all schools in South Africa by the South African Council for Educators (SACE).

In South Africa, teacher unions have a common focus and interest in contributing towards teacher professionalism. The South African Democratic Teachers' Union (SADTU) focused on transformation and development of education (SADTU, 2012). The South African Teachers' Union (SATU) has the professional development and the status of their members as their primary vision. Both the National Professional Teachers' Organisation of South Africa (NAPTOSA) and SADTU agree that it is the function of the principal to take care of the professional status of teachers while the union protects the welfare of their members. NAPTOSA and SATU also emphasize professionalism of teachers and concern for the child. SADTU has occasionally organised seminars on outcomes-based education training as well as a conference for principals on labour relations to improve the skills and knowledge of their members (SADTU, 2012). SADTU has in the past few years organised in-service training of teachers and capacity building workshops for new managers and principals in schools in order to help them to improve the Culture of Teaching and Learning (COLT).

Teacher unions in general act to protect the interests of their members (Bush, 2009), although the extent to which the unions take up this responsibility at times is questionable. Zengele (2013) found that SADTU tends to influence the outcomes of short-listing and interviewing of candidates for promotional posts. If the candidates preferred by the union are not recommended for appointment, the union declares a dispute. Consequently, the principal may end up with teachers favoured by the union who are not necessarily competent to serve in the new promotional post. In the light of this, the researcher in this study explored what happens during the interview process for teacher promotion to better understand the role of the union members and school principals.

1.3 Research problem

Trade unions in South Africa were formed with noble intentions; however, current events are contrary to the founding goals of trade unions (SADTU, 2012). Msila's (2014) study explored the perceptions of school stakeholders with regard to the effects of power relations between unions and school managers. The study

reported that principals struggle to manage teachers in a school where the union affiliation is politically strong compared to schools with weak union affiliation. Teacher unions, especially in township schools, have adopted a role of involvement in the promotion of teachers into promotional posts. In terms of the Educators' Employment Act, Chapter 3, Section 6(3), any appointment, promotion or transfer to any post at a public school may only be made on the recommendation of the School Governing Body (SGB) and not according to union preference.

According to Section 3.2.1(d) of the Collective Agreement no.2 of 2005, the role of the union representative is that of observer during the short-listing and interviewing process. However, it appears that in certain cases of the teacher promotion process, trade unions assume the decision-making role which is contrary to Educators' Employment Act. An example is in the case of the Soweto strike of June 2009 that lasted two weeks. During this industrial strike, SADTU demanded that a teacher with 18 years' experience as an administrator and six months as a teacher be appointed in the principal post, because he was a member of SADTU. Some principals and teachers were assaulted during the ensuing industrial action. Another example of union interference in the promotion of teachers was reported in a City Press article dated 20 September 2015 (*Sizwe Sama Yende*) in which a scam of promotional posts for cash allegedly conducted by SADTU office-bearers at different levels of the union was reported and a principal was murdered after numerous threats on her life were made.

The media have reported cases of disputes in the promotion of teachers and such cases indicate weaknesses in the promotion process and the conflicting roles of the different stakeholders. Against this background, a need arose to conduct research on the perspectives of teacher union representatives and principals in the process of promotion of teachers into promotional posts in Mpumalanga Province.

1.4 Rationale of the study

The researcher developed an interest in the topic as a result of his experience of interview processes for the promotion of teachers and literature on union activities in general. The researcher realized that it was a common practice to ignore experienced, suitable and qualified educators in favour of less qualified union

members for promotion (Zengele, 2014). Many disputes result in the schools in the district where the researcher works teaching and learning time has been compromised. In some instances educators and principals have been assaulted or prevented from attending school. Secondly, the researcher was alerted to the role of unions in promotions after reading the article by Hudson (2001) entitled “The Transformation 1”, which refers to achieving the National Democratic Revolution (NDR) in order to democratize the state by fighting ‘Colonialism of a Special Type’ (CST), the colonization of the mind. Many SADTU resolutions taken during their conferences mention the National Democratic Revolution (NDR) in order to achieve socialism. The researcher began to ponder the following issues: Why is a National Democratic Revolution (NDR) necessary to achieve socialism? Why are there disputes in the process of teacher promotion? What is the understanding of the different role players and their involvement in the selection interview process?

1.5 Purpose of the study

- To explore how representatives of teacher unions and principals understand their role in the promotion of teachers.
- To establish what the representatives of teacher unions and school principals view as factors to consider when recommending teachers for promotional posts.
- To explore what representatives of teacher unions do during the process of teacher promotion.
- To identify the challenges experienced by the representatives of teacher unions and principals in the process of teacher promotion.

1.6. Research question and sub-questions

What are the perspectives of the representatives of teacher unions and school principals regarding the role of unions in the promotion of teachers?

Sub-questions

- How do representatives of teacher unions and school principals understand their role in the promotion of teachers?
- What do the representatives of teacher unions and school principals view as factors to consider when recommending teachers for promotion posts?
- What do representatives of the teacher union do during the process of a teacher's appointment to a promotion post?
- What are the challenges experienced by the representatives of teacher unions and the principals in the process of teacher appointment to promotional posts?

1.7 Significance of the study

The findings of this study provide detailed knowledge of how the participants involved, viewed the interview process for teacher promotion. This adds to the body of knowledge on the influence of teacher unions on teacher promotion. The challenges experienced during the teacher promotion process are identified from the perspectives of the principals and the representatives of teacher unions. The findings of this study could inform policy-makers, the teacher unions and the school management regarding the interview process for teacher promotion.

1.8 Delimitations of the study

The study is qualitative and small scale, limited to five primary schools in a district in Mpumalanga. The participants were three school principals and two representatives of the teacher union, SADTU, selected by purposive and convenience sampling. Interviews were used to collect data. The findings cannot be generalized beyond that scope of the study and the participants involved. The study is descriptive in nature and focused on representatives of teacher unions and school principals' views of their role during teacher promotion interviews. Only the views of SADTU representatives form part of the analyzed data.

1.9 Outline of the study

Chapter one

The chapter gives the background to the study. The traditional role of teachers unions in the previous dispensation and in the current dispensation is outlined. The research problem is described and the rationale for the study is presented. The research question and sub-questions are also stated. The significance and delimitation of the study are outlined.

Chapter two

The literature review is discussed in this chapter. The researcher has compared the arguments and findings from different studies on the promotion of educators and the role of the different stakeholders. The researcher has also included the conceptual framework of the study.

Chapter three

This chapter deals with the research approach, design and methodology followed in the study. Credibility and trustworthiness of data and ethical issues taken into consideration before, during and after data collection are discussed.

Chapter four

The chapter presents the research findings from the interviews that the researcher conducted with the representatives of teacher unions and the school principals. The findings are presented in themes that are aligned with the research questions. This chapter also includes discussion of findings as it relates to previous studies on the topic.

Chapter five

This chapter concludes the study by providing the summary of the findings, recommendations and suggestions for future research on the topic. The limitations of the study are identified.

1.10 Summary of the chapter

The chapter gives an overview of the study. The problem statement is discussed as well as the purpose of the study and the research questions. Significance and delimitations of this study are outlined.

The next chapter presents the literature review which deals with prior research carried out on the research topic.

CHAPTER TWO

LITERATURE REVIEW ON TEACHER PROMOTION

2.1 Introduction

Chapter one contains the background to the study, the problem statement, the rationale and the significance of the study. The research questions and aims are also stated in the chapter. Chapter two presents the literature review on teacher promotion including the policies and guidelines for the promotion process. The researcher focused on the role and influence of teacher unions in schools and more particularly the process of teacher promotion.

There are different views of the role and influence of trade unions in the teaching profession. Bascia (2009), Poole (2009) and Peterson (2010) in the United States of America (USA), found that teacher unions are crucial partners in education and should take part in the implementation of education policies at school level. A study done in the United Kingdom (UK) by Stevenson (2003) Identified significant differences in the type and level of activities of trade unions in different schools. In some schools, the head-teachers reported active and positive communication with their trade union representatives which led to collaborative decision making and minimized problems and conflicts. In other schools, the study found that some head teachers were hesitant to engage the trade unions in school activities and only consulted with them on particular issues to avoid conflict (Stevenson, 2003). The relationship between the head teachers and the trade unions manifest in different ways. Teacher unions are involved in re-building and enhancing the teaching and learning environment in South African schools (Heystek & Lethoko, 2011). Heystek and Lethoko (2011) showed how SADTU was involved in teacher professional development through organizing seminars and workshops for capacity building for principals on out-comes based training and conferences on labour relations. In such a situation one can anticipate a relationship that is perceived as positive and supportive.

Although the different unions have a common interest in the welfare of the members and promoting education matters, some studies report the negative influence of teacher unions on education. Msila (2014) affirms that unions' influence on South African schools is destructive. This view emerges from the

history of teacher unions in South Africa. From 1980 onwards, apartheid structures were beginning to collapse. There was a growing feeling among younger teachers to confront the government using aggressive measures when necessary. The younger teachers were politicized by the 1976 uprisings, many of whom were still students (Hartshorne, 2010). As trade union representatives such teachers used the power associated with their affiliated union to influence the behaviour of the teachers who are members of the union (Zengela., 2013) Such influence could be negative or positive and this has an impact on the relationships as well as leadership and management of the teachers in the schools.

Msila (2014) found that the relationship between the school principals and the unions is based on the ability of the principal to manage the power that the union asserts on their members. Some principals involved in the study described tension and anxiety as a result of union interference in their managerial role. It was noted in the study that confident principals managed the power dynamics better than less confident principals (Msila, 2014). The relationship of the trade unions and the different stakeholders is complex and may differ from one school to the next. The attitude of the principal may determine the power of the trade unions to influence decision making processes in the schools (Stevenson, 2003). Such powers also play a role in the process of teacher promotion in which the principal and other SGB members are involved in selection interview process. The focus of this study is mainly on the actions of union representatives and school principals in the process of promotion interviews.

2.2 Teacher promotion

Burke and Cooper (2010) state that promotion is an important aspect of staff retention. The authors' further state that schools may want to retain effective teachers by recommending them for appointment into promotional posts which could incline towards management responsibilities. Wong and Wong (2005)'s study on teacher promotion in Hong Kong found that teaching experience and administrative competencies were considered as the most important factors to consider during promotion. In a study done in Kenya, Mugweru (2013) established that the qualifications of the teachers, their knowledge and skills, competency and

involvement in non-teaching activities are crucial factors considered during promotion of teachers.

In South Africa, *Employment Equity Act of 1998, Article 15* provides conditions for the selection process, which should provide equal opportunities for all the candidates who apply for the post and they should qualify based on the set criteria. In line with this Act, there is a need to appoint people into promotional posts to address the inequalities of the past. Thus, promotion can be prompted by the need to redress discriminatory tendencies; in this context affirmative action comes into play. Affirmative action aims at providing equal employment opportunities without compromising the standard of the advertised job (Zengele, 2009). Through affirmative action, the previously disadvantaged groups are given opportunity for career advancement. This study explores the teacher promotion process in general and is not limited to promotion based on affirmative action.

2.2.1 Policy on teacher promotion

The appointment, promotion or transfer of teachers in South Africa to any post establishment of a public school or a further education and training institutions, is done through the involvement of the governing body who recommends a suitable candidate for the post (Employment of Educators Act of 1998, Section 6(1) (a)). Section 7 of the Employment of Educators Act of 1998 states that when appointing teachers for a post, equality, equity and democratic practices must apply. The appointed candidate must be competent to fill the post and redress unfair labour practices of the past. The Act clearly empowers the governing body with the responsibility of making recommendation for teacher promotion and further stipulates the principles that should guide the approval of such post. However, the recommendation made by the governing body needs approval by the Head of Department. *Section 6(3)(b)* states that the Head of Department may reject the candidate recommended by the governing body of public schools or the council of the further education and training institutions when the set procedures for appointment are not followed. The Act also states that priority should be given to redressing past imbalances through providing opportunities for promotion of members of disadvantaged groups.

2.2.2 The role of SGB in teacher promotion interviews

The role of SGBs in selection interviews is clearly stated in the South African Schools Act no 84 of 1996 (SASA). The participants in Msila's (2014) study were all aware of the SGB's role in recommending a candidate to the provincial Head of Department but also indicated the influence of the unions in the selection process. Despite the empowering responsibility given to the SGB regarding the promotion of teachers as stated in SASA, there were conflicting views of the competency of the SGB members regarding conducting a fair and objective selection process (Ramokgotswa, 2015). Incompetence among SGB members, who are not competent to carry out their mandated role in teacher promotion interviews, and the union representatives, who disrespect the promotion procedure, reduces the effectiveness of the promotion process (Mugweru, 2013). In certain instances this situation has even led to loss of life (Harper 2014).

While the SGB members affirmed that they were competent to carry out the process as stipulated in SASA, as a result of training done by the Department of Education, other participants blamed the Department for incompetent SGB members due to lack of suitable training. Further, the study showed that at times SGB's surrender to the demands and preferences of the teacher unions and this may have a negative influence on the quality of education and the role played by the appointed person (Ramokgotswa, 2015).

2.2.3 The role of representatives of teacher unions in teacher promotion interviews

The Act states that the union representatives are expected to observe the short-listing and interviewing process and make their preference list. Ramokgotswa (2015) points out a gap between policy guidelines and the conduct of teacher unions during the selection interview process. Zengele and Coetzer (2014) reported that, according to the teachers interviewed in their study, the union representatives were aware of their role as observers. However, they disregarded their stipulated role and were active in influencing the selection process to ensure that their preferred candidate was appointed for a promotion post. In another study, the union members described their views as observers in different ways. Some union representative believed that their members were well trained during the workshops organized by the unions and were, therefore, better prepared to fill

the promotion post; others reported that sometimes the interview panel relinquishes the decision making power to the unions while other stated that the unions take over the process due to incompetent SGB members (Zengele, 2013). The authority and power that drives the union members' actions appear undefined and their conduct extends beyond the legislation and guidelines provided for the process of teacher promotion. Ramokgotswa (2015) noted non-compliance of teacher unions regarding their roles as observers during the selection interview process as stated in SASA.

In an earlier study on redeployment and teacher promotion, Zengele (2013) found that, instead of union members participating as observers, they end up dictating to principals who should be redeployed to promotional posts. Such studies suggest that despite the policies that state what is expected of the union representatives in the process of promoting teachers, the reality does not align to policy expectations. The policy guideline does not speak to the influence of union representatives in recommending candidates for promotion posts. Govender (2011) and Zengele (2013) pointed out that the policy ideals are far from reality with regard to what happens in schools during appointment and promotion of teachers. The reluctance of the Department of Education to take action against the teacher unions who ignore their observation role and participate in manipulating the appointment process fuels the power of the union in interfering and influencing the outcomes of the selection process to their advantage (Ramokgotswa, 2015). Unions appear to be reluctant to adhere to the observer role, rendering the policy ineffective. Wong and Wong (2005) state that teacher promotional procedures should be mutually accepted and criteria or procedures should also include effective communication and consideration of human factors that could influence the process.

2.2.4 Promotion process

Employment of Educators Section 3.3 Act of 1998 specifies the need for committees to be established for the purpose of conducting interviews to fill advertised vacant posts in schools. The committees are supposed to include one departmental representative, probably a principal from another school, to be an observer and provide necessary information as well as the principal of the involved

school. The SGB should also be on the panel and a union representative. The Act further requires that the interviews should be done according to the guidelines. The interview panel should mutually decide on the guidelines to be followed. The interviews should be based on the principles of fairness and equality. After the interview, a list of recommended candidates should be prepared according to preference, from most suitable to least suitable candidate. The panel which includes the governing body is expected to justify the preferential list of recommendation to the Department of Education. Although the intentions of the policy promote a democratic process in appointment of teachers to promotion posts, it does not guarantee effective appointments.

The study by Msila (2014) indicated that the participants expressed concern about the influence of the union on the candidates who are appointed as new staff members and their ability to perform their expected roles. In another study, several stakeholders were of the opinion that involvement of teacher unions in filling promotional posts at schools leads to appointment of candidates who are unsuitable for the post (Zengele, 2013). The union representatives at times recommend teachers who are their members for a promotion post not because meet the post requirement but due to their active involvement in union activities (Zengele & Coetzer, 2014). The interference with the procedures and criteria of filling the promotion post may result in promoting a less qualified candidate for the post. The policy lacks measures to counteract undue influence and lack of objectivity during the interview process for promotion and the recommendation of suitable candidates to the Department of Education.

2.3 The roles of principals and teacher promotion

The school principals are leaders and managers in their schools. Greenberg and Baron (2009) describe leadership as the process whereby one person influences individuals and group members' behaviour towards goal setting and goal achievement with no force or coercion. The school principals are expected to take a leading role in leading teachers which includes professional development and career enhancement. According to Section 16(3) of SASA, the principal is responsible to manage public schools in consultation with the Head of Department. The principal is accountable for the daily activities of the school and

work done by the teachers. There are policies that inform the principal of what is expected in the leadership and management role. Section 4.2 (d)(i) of the Employment of Educators Act of 1996, expects the principal to make certain that the school operates according to legislation, regulations and personnel administration measures stated in the Act. The principal must also ensure that the education of the learners is promoted in a proper manner and in accordance with approved policies. The principal must liaise with all stakeholders ranging from parents, educators, officials of the Department of Education and the business community.

School academic performance is generally attributed to effective leadership which is one of the aims of instructional leadership (Barber 2010). Instructional leadership can be understood as an approach of a leader that focuses on teaching and learning and on the behaviour of teachers in working with learners (Bush & Glover, 2012). Expressed differently, Mitchell and Castle (2010) posit that instructional leadership entails principals' actions which target improved learner outcomes. The principal's leadership should influence the behaviour of the teachers to improve the achievement of learners. In addition, Rubin & Rubin (2010) maintain that instructional leadership offers the greatest leverage for understanding the contributions that leadership makes to learning compared to other constructions of leadership. Through instructional leadership the principal should be able to identify the strength and weakness of a teacher and the requirements of the promotional post to be able to make an informed decision regarding the post. Thus, the principal is a resource person in this process,

The principal is part of the Interview Committee [section 3.3(i) of the Employment of Educators Act of 1998]. The principal as the resource person must assist and guide the SGB to conduct the interviews according to agree upon guidelines. The principal as a resource person has the power to manipulate the selection process (Zengele, 2013). The principal also has the daunting task of training the panel members how to conduct interviews and to acquaint them with rules and regulations that apply to promotion interviews. The principal is expected to play a key role in providing guidelines to be followed during the interview process. Such responsibilities give the principal the expert power and authority based on the knowledge of the policies and the needs and the requirements of the promotion

post. The policy implies that the principal should know the guidelines stipulated in the Employment of Educators Act of 1998.

2.4 Challenges experienced in the process of promotion of teachers

Certain challenges are encountered during the process of promotion of teachers. Msila (2014) reported a relationship of power struggle between the unions and the school management. The attitude of the principal may determine the power of the trade unions to influence decision making processes in the schools which could result in several challenges (Stevenson, 2003). Recent research conducted in South Africa pertaining to the role of teacher unions showed that the introduction of teacher unions has created fear, chaos and paralysis in some schools (Zengele, 2013). For example, the process of short-listing and interviews has been marred by the declaration of disputes as a result of teacher dissatisfaction. The teachers applying for promotion may face being interviewed by SGB members, who are semi-illiterate or illiterate. The latter are easily manipulated to score according to the terms and conditions of the unions. Experienced teachers have been overlooked in favour of young, more radical teachers who are also members of teachers unions (Mahlangu & Pitsoe 2011). Such practices may have an impact in learner achievement and general school effectiveness.

In a study on the causes of poor learner performance in KwaZulu Natal, Mthiyane ,Bhengu & Bayeni,S.D.(2014) revealed that the decline in learner performance in participating township schools was as a result of interference of SADTU in the promotion of teachers to the position of school principal. The unions demanded that teachers who are affiliated to SADTU be promoted into principals' posts. This led to conflict at schools because most preferred candidates were not qualified to lead and lacked experience of school leadership and management (Mthiyane et al, 2014). In one incident the union leaders disrupted a meeting of principals, the Head of Department (HOD) in the KwaZulu Natal Province and the Member of the Executive Committee of Education (MEC), because they were in disagreement with certain candidates who were promoted as principals. Other researchers (Mahlangu & Pitsoe 2011;Zengele 2013) also found that manipulation of the recruitment processes by both the SGB's and teacher unions has had a

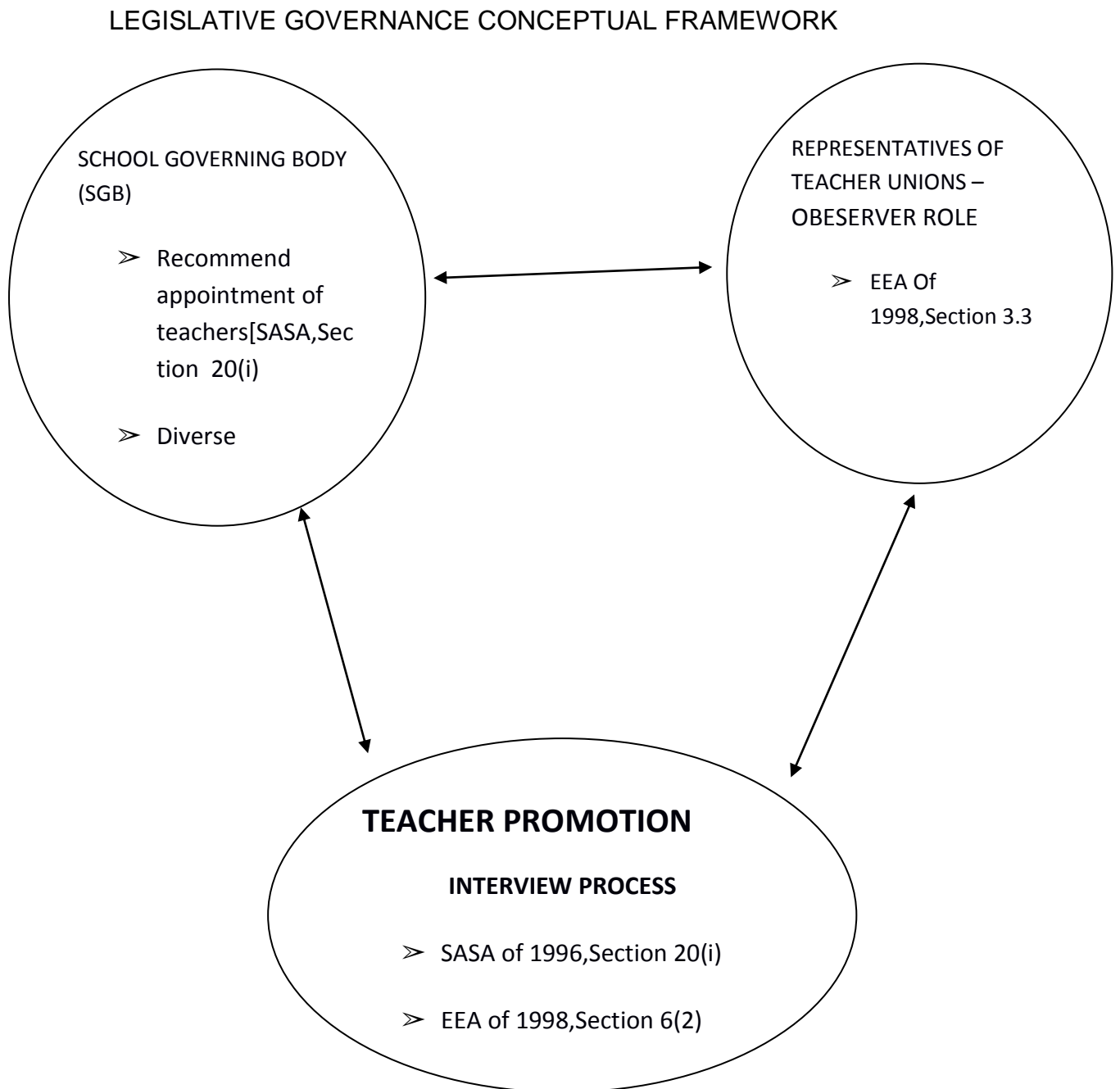
detrimental impact on schools. Incompetence of SGB members combined with interference by teacher unions has compromised the efficiency of the recruitment processes (Mahlangu & Pitsoe 2011) and led to violence (Harper 2014).

Representatives of teacher unions are challenged to satisfy the demands and expectations of the union members who want to be automatically recommended for promotional posts even if they do not meet the minimum requirements nor acquit themselves well in the interviews for promotional posts. Chubb and Moe (2009) state that unions advocate for teachers to be independent of the control of their school management. In the study done by Mugweru (2013) the school principals reported that the teacher promotion process was plagued by unfair selection processes, corruption, few promotion posts, the promotion of unqualified teachers and the lack of transparency regarding available promotion opportunities. Although the promotion interviews were conducted at the Teachers Service Commission headquarters in Kenya, involving a special panel and not the SGB and teachers union representatives as in the case of South Africa, the challenges identified were similar to those documented in South African studies.

2.5 Conceptual framework

In order to be able to explain the research findings, the researcher has used the Legislative Governance Conceptual Framework that focuses on policy for the selection and appointment of teachers to promotional posts (SASA 1996) and (Employment of Educators Act of 1998).

Figure 2.1 Conceptual Framework



The Legislative Conceptual Framework emphasizes equity and representativeness, which should also consider previous discrimination in appointments – but not on the basis of affiliation. The conceptual framework is entrenched on the promotion of individual rights and the promotion of democratic values. The Legislative Governance Framework informs the qualitative study reported on in this dissertation, because the study explores the application of the policy guidelines on the teacher promotion process. In this qualitative study, the researcher also consulted various Education Acts on guidelines and procedures to be followed in the process of promoting teachers. The Employment of Educators Act of 1998 and the Constitution of the Republic of South Africa of 1996 were some of the legal documents used in this study.

2.6 Summary of the chapter

In this chapter the researcher presented the literature on teacher promotion, discussed the role of the key players in the interview process and introduced the conceptual framework of the study.

In the next chapter the researcher discusses the research methodology used in this study.

CHAPTER THREE

RESEARCH APPROACH, DESIGN AND METHODOLOGY

3.1. Introduction

In the previous chapter, literature on the role of school principals, other SGB members and teacher unions on the appointment of teachers was presented. in national and international context. This chapter focuses on the research paradigm, approach, design and methodology used in this study that explored the experiences of union representatives and school principals in the promotion of teachers in Mpumalanga Province. The chapter also presents data analysis, strategies used to ensure credibility and compliance with ethical requirements.

3.2 Research paradigm

The purpose and direction of a research study is influenced by the paradigmatic assumptions of the researcher. According to Denzin and Lincoln (2010), a paradigm refers to ontological and epistemological beliefs that give direction to the study. A research paradigm can also be described as a collection of theories that are situated in a specific situation, such as positivist, post-positivist, interpretivist , constructivist and critical theory .The ontological stance in this study is the researcher's belief in the existence of multiple realities (Merriam,2009).The participants (i.e., the union representatives and the principals) may experience different realities concerning union involvement in the short-listing and interviewing of teachers for promotional posts based on their own observations and experiences. The participants have social worlds that differ from one participant to the next, so their constructed realities with regard to the focus area of the study may vary resulting to multiple perceptions of the single one phenomenon (Merriam, 2009).

The epistemological assumptions underpinning this study are that knowledge is constructed through participants' social interaction with their reality or the real world they live in (Creswell, 2009).This implies that knowledge of the involvement of trade unions in the short-listing and interviewing of teachers for promotional posts can be obtained by exploring the experiences of the participants. This qualitative paradigm enabled the researcher to analyse data inductively and to use the results of the analysis to make recommendations.

This study rests on the interpretivist paradigm. Interpretivism as a philosophical paradigm focuses on the meaning and understanding of research findings (Maree, 2011). Interpretive researchers posit that reality is subjective and socially constructed, giving shared meanings to the participants who experience the phenomenon. Due to the subjectivity of participants' experiences, interpretivists maintain there are multiple realities shaped by the time and place in which the phenomenon is experienced. According to the interpretivist paradigm, the participants and the researcher construct meaning of the social world collaboratively and make sense of the research findings through their interaction (Denzin & Lincoln, 2010). Interpretivist analyses the context of the study and give the participants opportunity to make sense of how they experience the aspect in their world under study (Creswell, 2014).

In this study, the researcher explored the participants' understanding of their role in the process of promoting teachers. The approach focused on how union representatives and school principals view and understand the world and construct meaning of their roles in the interview process for promotion based on their experiences. The process of listening to the experiences of school principals and representatives of teacher unions broadened the scope of the research on teacher promotion and provided deep insight into the way participants behave, during and after the interview processes.

3.3. Research approach

The research approach in this study was qualitative. Qualitative approaches focus on meaning of words rather on non-numerical data. Data may be generated from a variety of sources such as interviews, observations, audio-visual materials, and documents (O'Connor, 2010; Creswell, 2014). Merriam (2009) describes qualitative research as an umbrella term used to describe forms of inquiry which assist us to understand and interpret the meaning of social phenomena within the natural setting. The qualitative approach is most appropriate for this study because it can provide rich information since it uses different methods to explore the research topic. In qualitative research, the researcher uses non-rigid data collection methods to get in-depth information from the participants (Mouton & Marais, 2010).

The researcher asks ‘why’ questions to reach a deeper explanation of the experiences and views of the participants, the research context and possible patterns of behaviour of the participants. The most used method of data collection in qualitative research involves interaction with the participants to draw meaning from the relationships through interpretation of the data (Creswell, 2014). The generation of rich and in-depth information is an important aspect of qualitative research. Qualitative research has the potential of obtaining insight into the experiences of the participants by obtaining rich descriptive data from them. Qualitative approach focuses on exploration, investigation and deductive reasoning. It is assumed that reality consists of an individual’s mental construction of the objects with which she or he engages and that the engagement impacts on the observer and the situation being observed (Maree, 2011:54).

In this qualitative study, the researcher explored the participants’ (representatives of teacher unions and school principals) perspectives of their role in the process of promoting teachers. This qualitative study focused on how union representatives and principals view and understand their workplace environment (various schools) and construct meaning out of their experiences. The behavioural patterns of both the representatives of teacher unions and the school principals were observed in their natural environment (schools).

3.4. Research design

Research design is the plan that researchers use in their research (Maree, 2011:70). A research design provides a scheme of procedures to be followed in doing the research, such as the selection of participants to be involved in the study and how to collect and analyses data. The choice of a research design is guided by the research questions, the philosophical assumptions of the researcher and the chosen paradigm.

In this study, the research design is a qualitative case study that involved union representatives and school principals. A case study allows the researcher to explore individuals or organizations, simple or complex phenomena, programmes and relationships in a logical manner with the aim of collecting detailed data for analysis (Merriam, 2009; Yin, 2014). The case study design is a systematic inquiry of a phenomenon with the aim of describing and explaining what is being

experienced (Merriam, 2009). A case study is a bounded system within specific time frames and context (Cohen, Marion & Morrison, 2011; Merriam, 2009; Yin, 2010). In case study designs, the researcher does a comprehensive analysis of the case under study. Cases are time bound and activity bound (Creswell, 2014). This means that the researcher needs to provide a detailed description of the context of the study or the case itself for the reader to get a better understanding of the case and its boundaries. In the study the researcher explored the case of the role of union representatives and school principals in the promotion of teachers. The research is bounded to union influence in the promotion process of teachers in the selected schools and the viewpoints of the principals in the involved schools.

The strength of the case study design is that it is instrumental in understanding situations that are not well known, such as why interviews processes degenerated to cause such alarming, strained relations in the education environment. In order to achieve the purpose of this research, the case study design provided a large amount of detailed information that the researcher needed to explain the research topic and answer the research questions. The case study enabled the researcher to collect detailed information from union representatives and school principals by using a variety of data collection procedures over a particular period of time. Semi-structured interviews were used to gather information about participants' experiences in the promotion of teachers.

3.5. Research methodology

3.5.1. Research site

The research site comprised three primary schools in one district in Mpumalanga Province. The schools chosen had participated in the interview processes for the appointment of teachers into promotional posts in the past two years. The sample included schools that experienced disputes during the promotion of teachers into promotional posts. The provincial Department of Education was approached to assist in identifying such schools.

3.5.2. Sampling

Sampling refers to the decision about where to conduct an inquiry and who to include in it (Maxwell, 2013:96). Qualitative research seeks to interact with participants who have experienced the phenomenon to provide in-depth data (Creswell, 2013). The sampling is therefore mostly purposive. Purposive sampling targets participants who have the potential of providing in-depth data due to their knowledge and experience of the phenomenon (Maree, 2011). Purposive sampling is vital in selecting members who represent the target population that can best provide the information needed for the research (Maree, 2011). In this study, the researcher selected three principals of primary schools based on their knowledge and experience in the interview processes in their various work situations. The two union representatives selected were those who had participated in the selection interview process. Sampling was purposively done with clear intentions of obtaining in-depth data from the participants (Creswell, 2010).

3.5.3. Data collection

The researcher used semi-structured interviews to generate data. The reason for using semi-structured interviews was to strive for depth of participants' understanding about their experiences in the interview processes and to explore multiple dimensions of the experience of representatives of teacher unions and school principals during interviews processes (Rubin & Rubin, 2010). Qualitative semi-structured interviews were conducted individually and lasted approximately 45 minutes; interviews were tape-recorded and transcribed verbatim (Maxwell, 2011). Interview questions were prepared for both representatives of teacher unions and principals of primary schools. The researcher interviewed three principals from primary schools. The researcher also interviewed two officials from the teacher union; a branch secretary and a site steward. Semi-structured interviews include a method in which the interviewer has in mind a number of questions that are asked during the interviews. One advantage of using interviews to generate data is that the method is flexible and allows for the pursuit of unexpected lines of inquiry that are relevant to the research (Grix, 2010). The researcher chose to use the semi-structured interview as one of the data collection methods in this study to allow for the opportunity to have personal and direct

verbal encounters with the selected participants (Dicco-Bloom & Crabtree, 2009).

A set of structured but open-ended questions on an interview schedule was developed to guide the researcher during the interviews. The questions were used to explore in detail the views and experiences of the participants. All the interviews were audio-taped after obtaining consent from the participants. The researcher also wrote down notes on follow-up questions to ask during the interview. The disadvantages of interviews as data collection methods is that participants are sometimes skeptical of being asked questions or nervous to respond to certain questions. In this study the participants were informed before the interviews that information would be kept confidential and they would remain anonymous. However, despite that assurance they did not always participate freely. In some instances, the researcher felt they might have held back certain information.

Interview questions were designed to explore, in greater depth, the experiences of both representatives of teacher unions and primary school principals pertaining to the promotion of teachers into promotional posts. In the ensuing section, the selection and characteristics of interview participants, criteria for selection and the time line of the recruitment of participants are discussed.

3.5.4. Research procedures

The researcher personally visited individual participants and explained to them the purpose of the study, the process of data collection and ethical issues that applied to the study. The researcher gave each participant a letter from the University of Pretoria that explained in detail the whole process of conducting the research. It clearly identified the supervisor and introduced the researcher as a student. It also informed the participant that information collected would be the property of the University of Pretoria and kept for a period of about fifteen years. The researcher gave each participant a list of questions to be asked and informed them that the interview would be tape recorded and that pseudonyms would be used. The interviews were conducted in the afternoon after school hours in a quiet place. Notes were taken of important aspects mentioned by the participants. The tape recorded information was transcribed by the researcher.

3.5.5. *Data analysis*

Qualitative data were analyzed using thematic analysis procedures. In this study data from the interviews were transcribed and analyzed. Data do not provide an explanation of what is going on in the study. It is the responsibility of the researcher to make sense of the data collected by exploring and interpreting them (Bernard, et al., 2009). After each interview, the researcher transcribed and analyzed the interview data. He asked additional questions emerging from the interviews in subsequent interviews (DiCicco-Bloom & Crabtree, 2009).

Thematic data analysis process was used in this study. Thematic analysis is a qualitative method of analysis whereby the researcher analyses data by identifying patterns within the data and assigning themes to them. The researcher searched for similar patterns in the explanations given by the union representatives and the school principals. Patterns help to minimally organize and describe data in detail (Braun & Clarke, 2010). The researcher read the transcripts repeatedly and coded the data by marking the sections of the transcripts. Coding is the process of marking different categories of data with symbols, descriptive words or unique identifying names; it implies reading through transcribed data, line by line and grouping them into different units (Maree, 2011:105). Whenever the researcher locates any meaningful segment in the data, he highlighted and coded it. The codes were then grouped to form categories and then the categories merged to form themes. The researcher verified and confirmed the themes by searching through the verbatim interview transcripts for quotations that supported the themes.

3.6. Credibility and trustworthiness

According to Lincoln and Guba, (2010), in order to make study research credible, the researcher should use various techniques such as triangulation, member checking, and prolonged engagement in the field. Credibility involves establishing that results of the research are believable. It depends on the richness and accuracy of the findings rather than the amount of information gathered (Creswell, 2014). In this study, in order to ensure credibility, the researcher triangulated data from the different participants and the different schools. The researcher also

compared the data from the interviews with the data obtained from document analysis. Mahlangu and Pitsoe (2011) asserts that the cross-checking of data collected from different participants and different data collection methods enhances the credibility and trustworthiness of the study. The researcher also did member checking with the participants, a process that involved asking the participants to give feedback at different stages of the research, such as at the transcription process, data analysis, interpretation of data and the conclusions drawn (Lincoln & Guba, 2010). The comments of the participants were used as part of the analysis process. A tape recorder was used for accuracy in data capturing. The researcher furthermore provided an audit trail in the annexure of this dissertation as evidence of the process followed in this research study. The field work included follow-up interviews which enabled the researcher to clarify the information obtained from the interviews and the process of member checking added depth to the data.

3.7. Ethical considerations

According to the Helsinki Declaration of 1972, ethical clearance has to be obtained from an ethics committee to conduct any form of research involving human (or animal) subjects (Maree, 2014). Ethics is a set of moral principles which describe acceptable behaviour of an individual or a group and rules that ensure tolerable behaviour .Maree (2011) further explains that researchers are expected to apply certain ethical principles, for example, keeping the identity of the participants' confidential and concealing information that can reveal the identity of a participant. This could include obtaining letters of consent, obtaining permission to be interviewed, undertaking to destroy audiotapes, avoiding deception of participants, violation of privacy and harm to participants. It is the duty of the researcher to protect participants, build trust with them, promote the integrity of the research and guard against any form of misconduct. Attention must be paid to ethical issues before conducting the research, at the commencement of the research, during data collection and data analysis as well as in reporting the findings, sharing and storing data (Maxwell, 2014).

In this study, after defending the research proposal at the Education Management Forum, the researcher applied for ethical clearance from the University of Pretoria

Ethics Committee with the assistance of the supervisor. Written permission was also obtained from the Mpumalanga Department of Education and from the participating schools. The informed consent of the participating union representatives and school principals were obtained before the research. A consent form was used and it contained information regarding voluntary participation, anonymity, confidentiality and the right to withdraw from the study. The consent form indicated how the study would be conducted as well as how issues of confidentiality would be dealt with. The consent form also indicated how the information would be obtained from the participants by use of an interview and relevant documents were requested of participants. The researcher also explained the contents of the form and provided enough time for participants to consider and sign. After all participants had given written consent to participate in the study, the researcher arranged a suitable time and venue for a face-to-face interview. All interviews were conducted at the participant's preferred location.

The researcher assured the participants' anonymity and confidentiality by replacing their real names by letters to conceal their identity and any personal information from the readers. Further information provided in the interviews was not used for any other purpose than research and, as mentioned above, the data will be kept for fifteen years after which it will be destroyed. The research findings have been presented in the ensuing chapter and in the extract from an interview (Annexure C) in a way that the identity of the school and the participants is not disclosed.

3.8. Summary of the chapter

This chapter gives a detailed account of the research paradigm as well as the research approach, design and data collection process in this study. The researcher has also explained the sample selection and research site in this chapter. Credibility and trustworthiness of this research is also included in the chapter.

In the next chapter, the researcher presents the research findings, the analysis of the findings and how the findings relate to the literature on the research topic.

CHAPTER 4

RESEARCH FINDINGS AND DISCUSSION

4.1 Introduction

The previous chapter presented a discussion on the process of data collection and analysis. This chapter presents the research findings from the collected data. This qualitative study was conducted in one education district in Mpumalanga Province. The sample consisted of three primary school principals and two representatives of the teacher union (SADTU). The researcher used semi-structured interviews to collect data on the experiences and the views of the participants.

4.2. Biographical Information

The biographical profile of the participants is tabulated below in Table 4.1.

Table 4.1: The biographical information of the participants involved in the study

School	Participant	Gender	Teaching Experience	Highest Qualification	Union Responsibility
School A	Representative of Teacher Unions 1(RTU 1)	Male	23 years	BA Degree	Site Steward
School B	Representative of Teacher Unions 2(RTU 2)	Male	30 years	Advance Certificate in Education(ACE)	Branch Secretary
School A	Principal (P1)	Female	27 years	Advance Certificate in Education(ACE)	Leadership and management
School B	Principal (P2)	Male	28 years	B Ed (Honours) Degree	Leadership and management
School C	Principal (P3)	Male	31 years	Senior Primary, BA Degree	Leadership and management

4.3 Research questions and themes

Table 4.2 presents the research questions (Cf. Chapter 1) and the themes and sub-themes which emerged from the data analysis.

Table 4.2: Research Questions and Themes

	RESEARCH QUESTIONS	THEMES/SUB-THEMES
	How do representatives of teacher unions and school principals understand their role in teacher promotion interview process?	<p>Theme 1: How the representatives of teacher union and principals understand their role in teacher promotion interview process</p> <ul style="list-style-type: none"> • The role of representatives of teacher unions in the teacher promotion interview • The role of principals in the process of teacher promotion interview
2	What do the representatives of teacher unions and school principals view as factors to consider when recommending teachers for promotion?	<p>Theme 2: Factors to consider when recommending teachers for promotion.</p> <ul style="list-style-type: none"> • Academic qualification and the required skills • Prior knowledge of the applicant/Nepotism • Management knowledge and skills
3	What do the representatives of teacher unions and principals do during the process of teacher promotion interview?	<p>Theme 3: What representatives of teacher unions and principals do during the process of teacher promotion interview</p> <ul style="list-style-type: none"> • What representatives of teacher unions do during the process of teacher promotion interview • What school principals do during the process of teacher promotion interview

4	What are the challenges experienced by the representatives of teacher unions and the principals in the process of teacher promotion interview?	<p>Theme 4: The challenges experienced by the representatives of teacher unions and the school principals during the process of teacher promotion interview</p> <ul style="list-style-type: none"> • Experiences of representatives of teacher unions and school principals • How the identified challenges were addressed
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4.4 Themes and sub-themes

The researcher arranged themes and sub-themes according to questions posed to primary school principals and representatives of teacher unions.

4.4.1 Theme 1: How the representatives of teacher union and principals understand their role in teacher promotion interview process?

The representatives of teacher unions indicated that their major role is to observe that interview processes are transparent and fair. The principals interviewed agreed that their key role is to be resource persons in the interviews process, that is, to organize the required documents and ensure that applicable legislation is adhered to. They should also manage observers during the observing of interviews as prescribed by the rules and regulations.

The representatives of teacher unions involved in this study were fully aware that their mandate as observers during the interviews was to ensure that the interviews are conducted in a free and fair manner. The participants were in agreement that they should ensure that all the required documents are available and dully completed and signed. They confirmed that all applications forms are made available to the entire panel to peruse to ascertain if applicants meet the minimum requirements. One of the representatives of the teacher union said:

My role as teacher representative is to observe and to ensure that requirements of the post have been met and that the short-listing and interview process is conducted in a free and fair manner. I also ensure that all the required documents are available and correctly completed...I also

ensure that application forms received are made available to the panel (RTU 1).

I am expected to observe that all relevant processes are followed to the latter. I must also ensure that the post has been advertised following the correct procedures. For example, I must check that the post was advertised and given a reasonable time to elapse before interviews (RTU 2).

Their main legal role of the union representative is to observe if everything is done correctly during the interview process for promotion post. In some cases if you are not careful enough, they will interfere and move away from observing and taking the role of participating, which is wrong. It will depend on the resource person (principal) and the chairperson of the panel whether they manage them or not. If you do not manage them, they will definitely take over (Principal 1).

This finding indicates that the representatives of the teacher union knew and understood that their role is to observe. However, the participants also indicated that the union representative do not strictly keep to their role as observers but influence in selection process to their advantage. The findings indicate that it is of paramount importance to follow stipulated procedures in order to avoid or minimize unnecessary declaration of disputes. Another benefit of following stipulated rules and regulations is that it minimizes expenses associated with re-advertising and conducting interviews all over again. Apart from expenses, the participants were also concerned about fairness in the interview process. The views of the participants are expressed as follows:

Over and above, being authorized by law and my union, I will ensure substantive fairness is observed in the whole interview process. It is my duty as an observer to ensure that the interview process is not flouted to the extent compromising the best candidate to the detriment of the African child and compromise to quality education in the education fraternity. If processes are flouted, I won't hesitate to lodge a dispute (RTU 2).

The role of teacher representative was just to be there to observe the short-listing and interview process whether it was conducted in a fair and acceptable way (Principal 2).

The role of the representative of the teachers union was perceived to extend beyond the role of an observer. The participants said the following:

I must be offered an opportunity to comment at the end of the interview process to say that during my observation the process was free and fair (RTU3).

Their role is to promote and defend the interest of their members. They want to ensure that the process is fair and transparent. They are there to influence the outcome in favour of their members. They are also recruiting teachers to join their union (X). Their main tasks is to be observers of the selection and interview process (Principal 3).

The representatives of the teacher union participated in the interviews processes to ensure substantive fairness and to defend the interests of their members. The findings suggest that the representatives of the teacher union perceive their role in relation to the power they have and are able to use to promote the interest of their members.

The policy states that the unions should be involved in observing the process of drafting questions by the panel prior to the interview process (Employment of Educators Act of 1998, Section 3.3(b) (i)). At the conclusion of the interview process, the union representatives must declare whether the interviews were free and fair. The finding of the union acting beyond their expected role as stipulated in the policy (Employment of Educators Act of 1998, Section 3.3(b) (i)) is not a unique finding. Union representatives at times disrespect the policy regarding their role as observers and use their power to facilitate the endorsement of their candidate for the post (Ramokgotswa, 2015; Zengele & Coetzer, 2014). The persistent practice of ignoring the observer role of the union representative implies that other factors that need to be taken into consideration in stipulating the role of the union representatives during selection interviews. The findings of this study identified the issues of power and authority exercised during the interviews. It was

suggested that the union representative expects a more active role and at times dominates the interview process to the benefit of his/her candidate (Zengele, 2013). In such a situation, the principles of fair process during the interview are compromised.

In this study, the researcher asked the participants their views about the role of the school principal in the teacher promotion interview process. Participants felt that the principal was accountable for the process and should ensure that the selection is fair and carried out in an ethical manner. The following are the views of the participants:

The principal serve as a resource person in the panel and will ask questions during the interview. The members of the panel will do the scoring and not the principal. The principal has the responsibility of encouraging the scribe to capturing of minutes and completion with the reasonable time frame (RTU1).

The principal must ensure the panel is properly constituted and structured questions to be asked are thoroughly prepared. They should be part of the team that draws up the questions to be used during the interviews. The head of the school's comment or suggestion during the interview process carries more weight, because he/she runs the school and knows what is happening in the whole school (RTU 2).

I have to be a resource person. I must make sure that all the laws regarding the appointment of educators are followed to the latter, that includes the Employment of Educators Act of 1998, South African Schools Act of 1996. I must guide the panel to ensure that the process is free and fair and is addressing the needs of the post and to ensure that the relevant person for the post is appointed (Principal 1).

My role is to ensure that things are done according to guidelines as stipulated by the Mpumalanga Education Department .I am a resource person, because of my training as a principal. I also prepare my panel to select the best suitable candidate that will be serving under me (Principal 3).

The principal as an *ex-officio* member of the SGB and as the accounting officer and resource person must advise and guide the panel about the rules and regulations pertaining to the interview processes. The principal is capable of and should adequately carry out the pre-interview administration task based on his/her training as manager. The participants especially the representatives of the teacher union acknowledged the key role and the expert and legitimate power of the principal during the interview process. The principals also affirmed their role as knowledgeable experts of the interview process and their responsibility to provide guidance. They also managed and monitored the interview process and the proceedings and tasks at different stages: before, during and after the interview. The participants explained:

The principal of the school as the ex-officio member of the School Governing Body ... ensure that members of the panel are appointed ,sign the declaration of secrecy ,complete the attendance register. The principal will ensure that panel members know what is expected of them during the interview process. The members will be taken through the post profile. The long list will be presented to the panel and the members given a chance to peruse through the application forms (RTU1).

The principal as an umbrella or head of institution has access to the long list and is tasked with informing the School Governing Body (SGB) about the interview processes and inviting them to a meeting to select an interview panel for the short-listing and interviews. The principal must ensure that the venue of the interview is conducive for the interview and it is thoroughly prepared. They should be part of the team that draws up the questions to be used during the interviews. The principal must ensure that all members of the interview panel are in attendance (RTU 2).

I have played the role of being the chairperson of the interview panel. I have played a pivotal role of training my panel members on how to conduct the short-listing and interview processes. I have helped them on how to score and score correctly (Principal 2).

The findings of this study suggest that the principal, because of his or her knowledge and expertise, is expected to manage the interview process to ensure

that the panel knows their roles and responsibilities in the execution of their duties. Given the leadership position of the school principal and his/her knowledge of the curriculum needs, all the participants agreed that the principal must be afforded an opportunity to state these operational needs to the panel. There were indications of collaboration with the principal during the interview process. The principal was also perceived as a person that ensures that the process of the interviews is substantive, free and fair. A participant said:

The principal must act according to the principle of audi alteram partem (let the other party is heard). The principal must respect the opinions and suggestions from other panel members. The principal must ensure that the deliberations are recorded (RTU2).

The findings of this study show that participants are aware of and apply certain principles of natural justice in the promotion interview process. Listening to both sides of the story (*audi alteram partem*) was a principle mentioned by the participant quoted above. Compliance with ethical conduct in the interview process was also linked to the role of the school principal.

The principal must ensure that forms for declaration of secrecy are available and are completed by the panel members. The panel should be informed that by signing the declaration of secrecy, they are binding themselves not to divulge information to the public (RTU 2).

The principal's role included ensuring ethical practices during the interview process and the need to maintain confidentiality and privacy of the information obtained during the interview. The participants all agreed that by signing the declaration of secrecy forms should bind the participants to maintain strict confidentiality and not to divulge what was discussed in the interview meetings. Participants were sensitive to the consequences of contrary behavior which has far-reaching implications. The participants agreed that the principal as the resource person has the responsibility of taking the panel through confidentiality forms to ensure understanding of the contents. Zengele (2013) asserts that the principal as a resource person has the power to manipulate the selection process. The challenge of being a resource person is that the powers given to the principal should be balanced with the principle of fairness.

4.4.2 Theme 2: Factors to consider when recommending teachers for promotion

All the participants agreed that when recommending teachers for appointment into a promotional post, there are factors to consider such as academic qualifications, subject expertise and relevant experience in the subject to be managed. Sound human relations and good communication skills were mentioned as of vital importance. Managerial skills were also mentioned as a prerequisite for a person in management. Academic qualifications of the applicant are an essential factor to consider. The participants expressed the following:

The first thing to consider is the qualification of the teacher. We check whether the qualifications are relevant (RTU 1).

Teachers who should be considered are those who meet the minimum requirements of the post. Secondly they should possess the required skills, for example organizational skills, communication, coaching, mentoring skills.

They should be in possession of appropriate qualifications for the post they applied for (RTU 2).

What is important for an educator to be recommended for promotion, must be an educator who is qualified to manage that particular subject. In case of an educator who has applied for language post, it is expected that particular candidate must have done subject at secondary level as well as at tertiary level. The educator must be grounded in that particular subject (P2).

There are scores of SADTU officials who were promoted to management positions, including school principals, who are likely to be viewed with suspicion by post level 1 or classroom-based educators.

The importance of considering a participant with relevant knowledge and skills was emphasized by all the participants: the applicant has to be grounded in that particular subject. The skills required such as organizational, communication, coaching and mentoring skills were also considered as crucial as the subject knowledge.

In addition to subject knowledge and skills, the participants also mentioned the professional behaviour of the applicant as a factor to consider when recommending teachers for promotion.

The School Governing Body will consider factors coming to school on time, if a person is locally-based will be fairly easy to do so, but a person who is commuting will struggle to keep time. The personal appearance of the person will be an added advantage (RTU1).

Apart from teaching skills, the participants also considered the importance of management knowledge and skills for certain promotional post. They voiced the following:

...it can be that of a person is applying for a management position; he or she must have an Advance Certificate in Education (ACE) qualification or an equivalent to that. If an educator has a degree in Management that becomes an added advantage. The other equivalent qualification could be a Postgraduate Diploma in Public Management (RTU1).

The factors to consider depended on the type of promotional post and its requirements. The teaching post may have different knowledge and skill requirements compared to leadership and management posts. Good time management and being visible in the school contribute to a better teaching and learning culture. The teacher is expected to act *in loco parentis* (in the place of the parent), which is only possible if the teacher is present at all times at school. Punctuality is an indicator of good time management, respect for work and discipline.

Another isolated view was the appointment of applicant due to his/her status as an 'insider' with regard to the physical location of where the person lives.

The School Governing Body will not recommend for appointment someone who is not familiar to them. They would prefer the "son of the soil" or a person who stays in that area (RTU 1).

The preference of a promotion candidate based on prior knowledge and association with the person suggests nepotism. The problem with such

appointments is the lack of objectivity and it amounts to unfair labour relation practice. There is also no guarantee that the selected candidate is the best suitable person for the promotional post. Zengele and Coetzer (2014) also reported that union representative at times nominate active union members without consideration of their ability in the light of post requirements. School principals in the study done by Mugweru (2013) reported on unfair and corrupt selection processes whereby unqualified teachers were promoted as a challenge of teacher promotion. Despite the fact that the interviews are often done at the Teachers Service Commission headquarters in Kenya and do not involve teacher unions as in the case of South Africa, the process has similar challenges related to lack of transparency and fair procedures.

4.4.3 Theme 3: What the representatives of teacher union and principals do during the process of promotion interview

The representatives of teacher unions are of the opinion that they need to ensure that the composition of the panel is constituted in line with the *South African Schools Act of 1996*, *Employment of Educators Act of 1998* and the *Education Labour Relations Act of 1995*. The participants agreed that the main role of the representatives of teacher unions is to observe the interview processes and to ensure that substantive fairness in the recommending of teachers for appointment into promotional post.

Before the start of the interview, a panel that is selected according to the Education Act and Labour Relation Act should be constituted. The participants regarded one of their responsibilities during the teacher promotion interview is to ensure that the panel is authentic. This is evidence as follows:

As the union representative, I normally check whether the panel is properly constituted, that all application forms are made available to panel members. I also look at the composition of the panel to check if genuine stakeholders are part of the panel, in simple terms the legality of the School Governing Body members. It can be disastrous if panel members are not legitimately elected into the School Governing Body (RTU1).

The SGB is said to be legitimate if it is duly elected in accordance with the *South African Schools Act of 1996*. The parent component must comprise parents with learners enrolled at the school. Parents serving on the SGB with no learners at the school contravene the *South African Schools Act of 1996*; as a result the legitimacy of SGB is brought into disrepute.

Another responsibility of the representative of teacher union is to check on the post requirements. One of the participants said:

I look at the qualifications and also the requirements of the post. I also thoroughly check each and every form if copies of documents are appropriately certified and that all are citizens of the Republic of South Africa (RTU1).

This finding shows the effort made by the representatives of the teacher union to ensure that the selection of the promotion candidate is justified. The scrutiny of the requirements of the post suggest rigor in selecting the most suitable candidate for the post. Fairness is ensured when one is able to justify the reasons for choosing a candidate which are linked with the requirements of the promotion post. All the procedures stipulated in SASA should be observed during the interview. This is reflected in the following quotations:

I should more importantly observe that there is substantive fairness in the interview process and that all processes are in accordance with the South African Schools Act of 1996 and other relevant rules and regulations pertaining interviews (RTU1).

They are expected to observe if interviews are conducted in acceptable manner. To ensure that people (candidates) are not discriminated against or are treated unfairly during the interview process (P2).

There were incidences, it is an open secret, there is a possibility of biases and we should guard against that. We need to guard against getting someone who might not meet the necessary requirements, by so doing compromising the standard of education (RTU2)

In most cases they observe, but some do interfere with the process by coming up with suggestions that will favour their colleagues/comrades .In case they notice that the outcome of the interview will not favour the preferred candidate, they will object using some discrepancies that occurred during the interview process .In some instances some union representatives refused to sign the minutes of the interview process (P3).

Representatives of the teacher union participate in the interviews process in order to guard against manipulation of the process of the interviews. Their good intentions are to make sure that the standard of education is not compromised as a result of discrepancies that may occur in the interviews processes. The representatives of the teacher union also want to protect candidates from unfair treatment. They should be ready to declare disputes if there is an anomaly in the process of the interviews.

Apart from ensuring fair procedures, the representatives of the teacher unions assume the role of providing feedback on the fairness of the interview process. This implies that they are not passive but active observers whose voice should be heard.

I will not be recording the proceedings, but I should be allowed at the end of the interview process to comment /pronounce whether the process was free and fair. I will be expected to give a feed back to my union as a representative of teacher union (RTU 2).

The union plays a critical role, because in the end they must declare whether the process was fair or not (P1).

The findings of this study show that the union representatives had a say in declaring whether the interviews are free and fair. They hold a key position for the process to go ahead in recommending the appointment of the relevant candidate. In case they are not satisfied with a certain procedure, they are quick to declare a dispute. This is a power play and despite the specified observer role of the union representatives, they still use their assumed powers to manipulate the outcomes of the selection process to their favour. Mahlangu and Pitsoe (2011) assert that recruitment processes are manipulated by the SGBs and the union

representatives and the outcomes of such a selection process has a negative impact on the advertised post. Zengele (2013) states that the activities of the representatives of unions which interfere with the stipulated selection procedures result in fear, create chaos and tension which may paralyze school activities. The policy on teacher promotion is silent on the measures that could be taken where there is clear evidence of manipulated selection outcomes.

The participants in this study perceived the role of the principals as resource persons responsible for the preparation of documents required during the interviews processes. Their knowledge and skills are also evident as they guide the panel about procedures, regulations and rules to be followed during the interview processes. They also guide and advise the panel about the curricular needs of their schools.

The principal guides the chairperson of the panel in terms of questions to be asked and the questions are formulated in the morning in the presence of all panel members... The principal will guide the panel in terms of the curricular needs of the school. The principal will assist with the post profile of the particular post (RTU1).

... to assist the panel to look at the curricular needs of the school, like I said they are not specialist in the curriculum, but as the principal you must assist them. For example to some parents if you say you will be looking for a Setswana educator, to them Sesotho and Sepedi may sound the same and it is totally different, that is where you come in as an educator. Some of the subjects are new, some parents did not do them, you have to brief them when you say NST (Natural Science and Technology) what do you mean (P1).

The participants agreed that the principal as a resource person is the most relevant person to guide the panel about the requirements of the post. The principal is the curriculum accounting officer; he/she will not recommend for appointment a candidate that will compromise the culture of teaching and learning at his/her school. This study confirms the leadership of the principal and the use of legitimate and expert power during the interview process. The principal also manages the interview process. The participants explained:

The principal as the resource person will make sure that the attendance registers are in place, the scribe is well equipped to execute his/her duties. The principal will ensure that applicants are allocated a place to sit while waiting for their turn (RTU 1).

The principal must make sure that confidentiality forms shall have been signed before the commencement of the interviews. The most important task of a principal is to ensure that the whole interview process is not compromised and all the rules and regulations are adhered to at all times (RTU 2).

I am the resource person to the panel. I assist them with the material that they will need for the interviews. In some instances I served as a chairperson of the panel, I ask the candidates questions and I also coach the panel how to score. Prior to the interview, I tell them to select a relevant candidate to advance the vision and the mission of the school. I also assist them to sign the declaration of secrecy forms (Principal 2).

As an ex officio/resource person, the basic thing is to make sure that the whole process right from short-listing to the final recommendation is within the pyramids of the legislation and the laws of education (P1).

The participants all agreed that the principal plays a pivotal role in the smooth running of the interviews because of his/her leadership and management skills. Due to the knowledge and skills of the school principal, he/she is expected to recommend the most suitable person for promotion post after the interview process. This is echoed in the following quotes:

As I said before, “Uneasy is the head that wears the crown “, eventually at the end of the whole exercise will be looking upon the principal to make the final recommendation and of which we must consider because he/she is the person who runs the day to day affairs of the school and who knows the right candidate (RTU2).

...The problem is, the panel is composed of parents who are not educated. The candidate will impress the panel by using bombastic words. Then you will find a candidate with a stage fright, but you can see that he/she knows

what she/he is talking about. He /she cannot express, that is where you guide the panel. The final decision comes from the panel you simply guide them (P1).

The responsibility of recommending the most suitable person to be promoted is based on the assurance that the school principal is in the best position to make such a recommendation due to his/her expert knowledge and skills. The principal however must cooperate with the rest of the panel to reach an agreement regarding the most suitable candidate for the appointment.

4.4.4 Theme 4: The challenges experienced in the process of recommending teachers for promotion

The process of recommending teachers for promotion is a matter that creates many challenges. The process has been often met with declaration of disputes that in some instances brought the Culture of Teaching and Learning (COLT) to a halt. There has been intimidation of both principals and educators. Representatives of teacher unions have in many instances wanted to influence the outcomes of the interviews processes. Where they could not orchestrate decisions, they came up with the means or excuses to halt the process. The parent component that in most cases in rural schools and severely disadvantaged areas is illiterate is easily manipulated to recommend candidates in accordance with the wishes of the representatives of teachers unions.

This study identified several challenges experienced by the representatives of teacher unions and school principals during the interview process for promotion of teachers. Since the interview panel includes teachers and SGB members, there is the challenge of different literacy levels. Some panel members may be illiterate while others may be ignorant of what is expected in such interviews and the policies that stipulate the procedures to be adhered to in the interview process.

The biggest challenge that I have experienced is that some or most of School Governing Body members of the panel are illiterate and cannot score candidates correctly. The results are that in some instances candidates who do not deserve appointment are appointed (RTU1).

One of the basic challenges is the capacity of the SGB, they are not educators, they do not know the nitty gritty of the subjects at school. They look at the expression of the person, not what the person is saying. The secretary cannot capture everything as when he/she is writing. At some stage a tape recorder was recommended, but there are some candidates who are objecting to that, so that becomes a futile exercise (P1).

This study suggests that the knowledge of the panel members, especially the parent component may be limited when it comes to curriculum matters. They may rely mostly on the representatives of teacher unions and the principals for guidance. Thus, they run the risk of manipulation into agreeing to the suggestions of the representatives of the teacher unions. They may recommend a candidate for promotion based on his/her English proficiency and not on the content of his/her responses during the interview. There is also the problem of a lack of objectivity in promotion process. This is reflected in the following quotation:

There was a challenge raised by a teacher who was a panel member. She raised a concern that why a certain teacher was not short-listed. The teacher belongs to X union, she wanted her fellow comrade to be short-listed and recommended for appointment (P2).

In a school that I will not mention, the view of the panel was that candidate X is more suitable and should be recommended, but the union had another candidate in mind. They wanted to manipulate the process so that the candidate they prefer is considered for recommendation (P3).

The first challenge I picked up as I have been observing interviews, was the challenge of nepotism, biases in favour of a relative. When we submit ourselves for an interview, we are ready to assume the responsibility of managing the curriculum. In appointing a person who is a relative, that is practising nepotism, is lowering the standards and norms of the preferred candidate (RTU2).

These findings suggest that the representatives of teacher unions may participate in the interviews with a certain candidate in mind that they expect to be recommended for appointment to a promotional post. The result of this kind of

mind-set is that, if that particular candidate is not recommended for appointment, the union representatives may declare a dispute. This may motivate the representatives of the teacher union to do whatever it takes to manipulate the process to their favour.

Another challenge is to result in disputes being lodged on our part as union activists was the non-commitment to procedure and fairness. There is also a possibility of one receiving a sheep as gratuity, and that is against the law and unethical. The other challenge is when requirements not being met .The other challenge is the undue pressure by those in higher offices like circuit managers who will want to appoint their preferred candidates. The other challenge is the delay in appointments after the whole process on the interviews (RTU2).

Although the Employment of Educators' Act of 1998 stipulates the role of the different stakeholders during the interviews for promotion, evidence suggests that in reality the procedures are not followed as stated. Involving SGB members in the interview panel gives the governing body members authority to exercise their role and be accountable for the teachers in their schools. The task becomes challenging and may be ineffective when the SGB members are poorly educated or illiterate and are not conversant with policy expectations of the promotion process.

Some problems experienced during the interview process could be as a result of ineffective communication. Wong and Wong (2005) argue that, due to unforeseen human factors, the criteria and processes of the teacher promotion process may not be implemented as expected. The current policy on teacher promotion is 'one size fits all' while the school context and the competencies of principal and the members of the governing bodies differ from one school to the next. In a school context with a highly politicized union presence and activities, the panel may face more union assertiveness in the interview process than in other areas.

4.4.5 How the representatives of teacher unions and the principals address the identified challenges

The participants all agreed that there should be strategies to address the challenges identified in this study. A proposed solution is getting knowledgeable panel members who are literate and conversant with the policies and acts that stipulate how the promotion process should be handled. This finding is explained in the following quotations:

The challenges can be addressed if the panel members can involve representatives of teacher unions who are more knowledgeable because of the advance and continuous training that they do receive from the workshops that they attend (RTU 1).

In our circuit, special training was arranged to prepare School Governing Body (SGB) members on how to conduct interviews. The conducting of interviews has minimized the declaration of disputes in our circuit. Follow-up workshops were conducted during the course of the year to further capacitate panel members to be ready to handle future interviews with distinction. Empowered panel members ensure that they will not be manipulated easily because they now know exactly what their role in the interview process is (P3).

The findings of this study suggest a need for panel members to be familiarized with the applicable rules and legislation for the promotion of teachers. Representatives of teacher unions should be trained by their respective unions on how to manage the power relations associated with the observer role, active participation in the interview process and the lack of objectivity during the interview process. The participants suggested that a panel member with a conflict of interest regarding an applicant should not participate in the interview.

We need to guard against being subjective in the interview process. In the event one of the interviewees has a relative or friend as candidate, he or she should not be in the panel... The panel members should strive for absolute objectivity at the expense of absolute subjectivity. That will minimize or eliminate unnecessary lodging of disputes (RTU2).

The challenge of a union member who was part of a panel and was immediately called to order. I had to refer to a relevant legislation pertaining the interview process and remind her of what we learnt during the workshop for short-listing and interview processes (P2).

Objectivity refers to not being influenced by opinions or feelings. In the interview processes the panel should not be influenced by factors such as a candidate's membership of a particular union or language ability while not addressing the questions posed. An objective panel will lead to a decline in the declaration of disputes.

4.4 Summary of the chapter

In this chapter, the researcher presented the data generated from semi-structured interviews with two representatives of a teacher union and three school principals. The emerging themes were aligned with the research questions. The findings are integrated with references from literature for comparison and differences in the experiences of the participants in this study and the findings from previous studies done in other contexts.

The next chapter provides a summary of the findings, conclusions, and recommendations and suggests topics for future studies in the research focus area.

CHAPTER FIVE

SUMMARY OF FINDINGS, CONCLUSION AND RECOMMENDATIONS

5.1 Introduction

In this last chapter, the researcher presented and discussed the findings of this study. The researcher conducted this qualitative study in one education district in Mpumalanga Province. The purpose of the study was to explore the perspectives of the representatives of teacher unions and school principals of their role during the interview for promotion of teachers. Five participants were purposively selected to be interviewed in this study. The main research question was - What are the perspectives of the representatives of teacher unions and school principals regarding the role of unions in the promotion of teachers?

The research sub-questions were:

- How do representatives of teacher unions and school principals understand their role in the promotion of teachers?
- What do the representatives of teacher unions and school principals view as factors to consider when recommending teachers into promotion posts?
- What does the representative of teacher unions do during the process of teachers' appointment to promotional post?
- What are the challenges experienced by the representative of teacher unions and the principal in the process of teacher appointment to promotional posts?

The participants included three primary school principals and two representatives of teacher unions. This chapter contains a summary of the findings, conclusions and recommendations based on the findings. The researcher also acknowledges the limitations of this study and suggests areas for future studies on the research topic.

5.2 Summary of research finding

The summary of the findings are presented according to the themes that are aligned with the research questions.

5.2.1 How the representatives of teacher union and principals understand their role in teacher promotion interview process

The role of the representative of teacher unions was explained by the principals and the representatives of teacher unions as - acting as an observer in ensuring that the process was fair and the interest of their members was promoted. There were also concerns about what happens in practice. The representatives of the union felt that they have a greater role to play that goes beyond being an observer. The representatives of teacher unions perceive their role in relation to the power they have and are able to use to promote the interests of their members. The principals also noted the extended activities of the representatives of the union as a disregard of the policy guidelines which resulted in influencing the outcome of the interview process in favour of their union members.

The role of the principal was perceived as a resource person who should account for ensuring that the promotion interview process is conducted fairly. The principal was expected to guide the panel and to remind members of the rules and regulations to be observed during the interview process. The principals' role as a resource person includes training of the panel and making sure that the rules and regulations of the interview processes are adhered to. The participants especially the representatives of teacher union were aware of the expert and legitimate power of the principal during the interview process. The principal's role included taking a leading role in preparation before the interview and providing guidance and monitoring the interview process that includes making recommendation regarding the most suitable candidate for the post.

5.2.2 Factors to consider when recommending teachers for promotion

In this study, the participants identified the factors to be considered when recommending teachers for appointment: academic qualifications based on subject specialization, good communication skills, the ability to develop sound human relations and, in some cases, managerial skills. Although all the

participants mentioned the same requirements, there were concerns of nepotism as a factor that affects the requirement criteria and threatens the fair procedures stipulated in teacher promotion guidelines. Apart from nepotism, value shown to a candidate based on union affiliation and not on the post requirements was also mentioned by some participants as an unfair practice. The promotion of union members that takes precedence over the post requirements may potentially result in promoting candidates who are not competent and are unable to perform their expected role effectively.

5.2.3 What the representatives of teacher union and principals do during the process of promotion interview

This finding of this study shows that the main responsibility of the representatives of the teacher union is to ensure that the process of selection of teachers for promotion is fair and their members are not disadvantaged or unfairly treated. During the selection process, they scrutinize the requirements for the post and suggest changes where necessary. The representatives of teacher unions were not passive observers as stipulated in the policy but played an active role in providing feedback on the fairness of the interview process. They felt that their voice should be heard and they had a say in declaring whether the interviews were free and fair. They also participate in recommending the appointment of a suitable candidate for the promotion post. Such involvement of the representatives of teacher unions is perceived by the principals as manipulating the outcomes of the selection process.

The participants reported that the principal as a resource person leads and guides the panel by providing the information on post requirements and the process to be followed in the promotion interviews. The leadership of the principal during the promotion interview process is based on legitimate and expert power. The knowledge of the post requirement and the policy that guides the selection process are a source of expert power demonstrated by the principal during the interview process. The principal is expected to use his/her knowledge and skills to lead the panel in recommending the most suitable candidate for the post. This study revealed that what the principals involved in the study do during the interviews for promotion is in line with the policy.

5.2.4 The challenges experienced in the process of recommending teachers for promotion

This study found that the stakeholders in the interview panel for teacher promotion have different levels of literacy. SGB members in particular exercise their role as school governors and are accountable for personnel in the school. The governance responsibility becomes ineffective and problematic when the SGB members are illiterate and not conversant with policy expectation of the promotion process and the requirements for appointment. Such panel members may have different conceptions and views about the most suitable person for that post resulting in conflicting opinions. Alternatively they may rely on the principal and the representatives of the union to make decision during the interview. By doing so, they surrender their democratic power and create opportunities for manipulation of the outcomes of the selection process.

In this study the participants' responses suggested that some principals feel intimidated by the influence of the representatives of teacher unions on the outcomes of the selection process. The findings show that at times representatives of teacher unions attend the interviews having a particular candidate in mind whom they want to promoted. They are then prepared to contest and declare a dispute if the outcomes of the interview do not favour their preferred candidate. This violates the intentions of the policy guidelines for promotion interviews. This indicates a lack of mutual trust and confidence among the panel members in the selection interview process.

5.2.5 How the union representatives and the principals address the identified challenges

The participants suggested training the promotion interview panel to ensure familiarity with the legislation for promotion of teachers and the rules and regulations to be followed. Some participants talked of follow-up workshops to train the panel to handle situations that could result in disputes. The purpose of the proposed training was to empower the panel members especially the SGB members with knowledge about the interview procedures so that they are not manipulated by other panel members. There was also a concern for a lack of objectivity during the interview process due to situations where there was a conflict

of interest. The participants suggested that in such likelihood, the panel member with a conflict of interest with an applicant should not participate in the interview.

5.3 Conclusion

This study focused on the role of the representatives of teacher unions and the school principal with regard to interviews for teacher promotion. Although most of the findings confirm what other researchers have reported on the influence of teacher unions on the appointment and promotion of teachers, this study highlights the fact that the representatives of teacher unions are cognisant of their role as observers. However, the study reveals that the representatives of the teacher union are optimistic that they should and could play a more active role in the interview process for teacher promotion. Such involvement could include scrutinizing the requirements for the post, giving feedback about the process and participating in recommendation of a suitable candidate. Although the principals in this study seem to perform their role as stipulated in Employment of Educators' Act of 1998, they remain skeptical about the activities of the union representative which exceed observer status. The relationship between the principals and the representatives of teacher unions is affected by a lack of trust and power struggles between the school management and the representatives of the union. While the principals appeared to be capable of managing the interviews, the influence of the union representatives threatened the expected fair procedures.

5.4 Recommendations

Recommendation one

This study shows that the school principals and the representatives of teachers unions are aware that the role of the union representative should be that of an observer in ensuring substantive fairness in the interview process. However, there is a tendency for the representatives of teacher unions to disregard their role and become active participants in the interview process. The researcher in this study recommends that the policy of the role of the union representatives in the promotion interview process should be more flexible. Moreover, the union representatives sometimes do not comply with their role as passive observers. The researcher recommends that there is need for dialogue among all the relevant stakeholders which should lead to amendment of the policy to enable the union

representative to give inputs in a constructive manner. The nature of the input from the representatives of the teacher union should not be prejudiced in favor of promoting their members who do not qualify for the post nor should they be antagonistic to other members of the panel. The principal and the representatives of the teacher union should perform their role with the aim of improving the quality of education.

Recommendation two

Unions should ensure that suitable educators are promoted and that the requirements of the promotion post are used to determine the most suitable candidate. In cases where there are disputes as a result of unfair procedures whereby an unsuitable candidate is recommended for the post because of nepotism or union affiliation, a neutral party should act as arbitrator. The negotiation should focus on the requirements of the promotional post.

Recommendation three

The role of the representatives of the teacher unions should be expanded to involve them as partners in the selection process unlike their current role of observers which focuses on ensuring fair procedures for the members. There should be a common and shared understanding of the needs of the promotional post to reduce possible disputes and ensure that the most suitable candidate is appointed. The relationship between the union representative and the principal should be collaborative and supportive with a common goal of ensuring productive and healthy labour practices.

Recommendation four

This study further reinforces the recommendations from other studies on the need to train and develop the SGB members who are part of the panel for promotion interviews. All the panel members should be made aware of their expected role and be competent in participating actively in ensuring that the most suitable candidate is selected for a promotional post. Such training should be done internally or at the Department of Education depending on the needs of the panel members. Representatives of teacher unions should also be trained in communication and negotiation skills and be able to present their case to other

panel members instead of using threats or intimidation to achieve their goal. There is also a need to advise the representatives of teacher unions on how to manage the mandate of the union in representing their members during a promotion interview so that it does not conflict with Employment of Educators' Act of 1998.

5.5 Limitations of the study

This study is primarily concerned with what the representatives of teacher unions and principals do during the interview for promotion of teachers. The analysis of data in this study has focused on the expected role of the representatives of the teacher unions and the principals during promotion interviews as stated in Employment of Educators' Act of 1998. This qualitative study involved only five participants: two union representatives and three school principals. The findings of this study are limited to the views of principals and representatives of the teacher unions involved in the study. The researcher cannot rule out participant bias during data gathering since participants' views were a reflection of what they believed in and what they did during the interviews. The views of the other panel members such as the SGBs are not part of the findings of this study. Finally, the findings of this study cannot be generalized to other schools.

5.6 Future research

The scope of this case study was limited to five participants and explored the views of the role they played in teacher promotion interviews. Future research should explore the views of the representatives of teacher unions regarding how they can contribute to a fair selection process while also protecting their members against unfair practices. There is also a need for a quantitative study on the influence of the representatives of teacher unions on teacher promotion to determine the extent to which the union representative may influence the outcomes of the promotion interviews. Quantitative studies can also be carried out to predict the behaviour and influence of representatives in promoting the interests of their members during promotion interviews.

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ANNEXURE A: PERMISSION LETTERS



Building No. 5, Government Complex, Kwamhlanga, Mpumalanga Province
Private Bag x 4021, Kwamhlanga, 1022
Tel : 013 947 1500, Toll Free Line 0800 203 116

Litiko leTemfundvo, Umnyango weFundo

Departement van Onderwys

Ndzawulo ya Dyondzo

Enquiries : SM Kabini
Tel : 013 947 1745
Email : s.kabini@education.mpu.gov.za

Mr. James Mhlongo
P O Box 1691
Delmas
2210

Dear Mr. Mhlongo

Re : Request for permission to conduct research in Nkangala District.

The above matter refers.

1. We hereby acknowledge receipt of your letter on the above matter.
2. Permission is hereby granted that you conduct the research to principals only, as we do not have Jurisdiction to teacher Unions.
3. A separated request must be directed to teacher formations by yourself for this purpose.
4. Please make prior arrangement with schools before you visit so that teaching and learning does not get affected.
5. We hope you will succeed and you get necessary cooperation from schools.
6. Thank you.

MR. JJ MABENA
DISTRICT DIRECTOR

2016-09-16
DATE





ANNEXURE A

PERMISSION LETTER - SADTU – WILLY MATHAILA REGION.



Faculty of Education

Fakulteit Opvoedkunde
Lefapha la Thuto

Dear Sir/Madam

REQUEST FOR PERMISSION TO CONDUCT RESEARCH IN THE SADTU-WILLY MATHAILA REGION --MPUMALANGA PROVINCE.

My name is James Mhlongo and I am a M.Ed. student at the University of Pretoria. I am conducting research on “**Experiences of teacher union representatives and principals in the promotion of educators**”. My project is supervised by Dr Teresa Ogina who is a lecturer at the Department of Education Management, University of Pretoria. The purpose of this letter is to request you to grant me permission to collect data in selected sites(schools) in the SADTU-Willy Mathaila Region. I will interview a branch secretary and a site steward who be randomly selected. The aim of the study is to explore the experiences of teacher union representatives and principals during the processes of selecting educators for promotional posts.

The data will be collected through **tape-recorded interviews** and document analysis. Each interview will take about 45 minutes. Only participants who have given their consent will participate in this study. Data collected from this study will be kept strictly confidential, and neither the schools nor the participants will be identifiable in any



report. The participants may withdraw at any time during the research process without any penalty.

After I have received approval to approach the participants I will:

- obtain informed consent from the educators(branch secretary and site steward), and
- arrange time for data collection in the schools, which will be after school hours.

The findings of this study may provide insight to Education Leadership, Management and Policy issues in schools. **All the data collected with public funding may be available in an open repository for public and scientific use.**

If you have any questions regarding this study, please contact me (see contact details below) or my supervisor (Dr Teresa Ogina; cell 0721289958 phone number 0124202445; e-mail taogina@up.ac.za).

Thank you for taking time to read this information.

Kind regards



.....

James Mhlongo

Cell no. 0833784494

E-mail: mhlongojames@yahoo.co.za



.....

Supervisor: Dr Teresa Ogina

Cell 0721289958/ 0124202445

Email taogina@up.ac.za



Faculty of Education

Fakulteit Opvoedkunde
Lefapha la Thuto

Dear Sir/Madam

REQUEST FOR PERMISSION TO CONDUCT RESEARCH IN THE NKANGALA DISTRICT --MPUMALANGA PROVINCE.

My name is James Mhlongo and I am a M.Ed. student at the University of Pretoria. I am conducting research on “**Experiences of teacher union representatives and principals in the promotion of educators**”. My project is supervised by Dr Teresa Ogina who is a lecturer at the Department of Education Management, University of Pretoria. The purpose of this letter is to request you to grant me permission to collect data in selected schools in Nkangala District. The aim of the study is to explore the experiences of teacher union representatives and principals during the processes of selecting educators for promotional posts.

The data will be collected through **tape-recorded interviews** and document analysis. Each interview will take about 45 minutes. Only participants who have given their consent will participate in this study. Data collected from this study will be kept strictly confidential, and neither the schools nor the participants will be identifiable in any report. The participants may withdraw at any time during the research process without any penalty.

After I have received approval to approach the participants I will:

- obtain informed consent from the principals and educators, and

- arrange time for data collection in the schools, which will be after school hours.

The findings of this study may provide insight to Education Leadership, Management and Policy issues in schools. **All the data collected with public funding may be available in an open repository for public and scientific use.**

If you have any questions regarding this study, please contact me (see contact details below) or my supervisor (Dr Teresa Ogina; cell 0721289958 phone number 0124202445; e-mail taogina@up.ac.za).

Thank you for taking time to read this information.

Kind regards

.....

James Mhlongo

Cell no. 0833784494

E- mail: mhlongojames@yahoo.co.za



.....

Supervisor: Dr Teresa Ogina

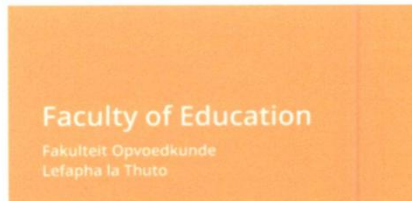
Cell 0721289958/ 0124202445

Email taogina@up.ac.za



ANNEXURE B

LETTER TO THE PRINCIPAL REQUESTING PERMISSION AND CONSENT



Dear Sir/Madam

REQUEST FOR PERMISSION TO CONDUCT RESEARCH IN YOUR SCHOOL AND YOUR CONSENT TO PARTICIPATE IN THE STUDY

My name is James Mhlongo and I am a M.Ed. student at the University of Pretoria. I am conducting research on **“Experiences of teacher union representatives and principals in the promotion of educators”**. My project is supervised by Dr Teresa Ogina who is a lecturer at the Department of Education Management, University of Pretoria. The purpose of this letter is to request you to grant me permission to collect data in your schools and to invite you to participate in this study, but before you agree or refuse to participate in this study, please read the information about the intended research provided below.

The aim of the study is to explore **“The experiences of teacher union representatives and principals during the processes of selecting educators for promotional posts”**. If you agree to participate in this study, I will collect data through **tape-recorded** semi-structured interviews. I will interview you (it will take about 45 minutes) after school hours at a place that is convenient for you. Data collected from this study will be kept

APPENDIX B

INTERVIEW PROTOCOL UNION REPRESENTATIVE MEMBER

1. Tell me about yourself (how long have you been a union representative)?
2. What can you say is your role in the interview process of teacher promotion?
3. What is the role of school principal in the process?
4. In your view, what are some of the factors to consider when recommending teachers for promotion?
5. What do you do during the promotion interview process?
6. What do school principals do during the interview process?
7. What are some of the challenges that you have experienced in the process of recommending teachers for promotion?
8. How were the challenges addressed?
9. Is there anything else that you would like to tell me about the process of recommending teachers for promotion?

INTERVIEW PROTOCOL SCHOOL PRINCIPALS

1. Tell me about yourself (how long have you been in this school)?
2. What can you say is your role in the interview process of teacher promotion?
3. What is the role of representative of teacher union?
4. In your view, what are some of the factors to consider when recommending educators for promotion?
5. What do you do during the promotion interview process?
6. What do members of union representative do during the interview process?
7. What are some of the challenges that you have experienced in the process of recommending teachers for promotion?
8. How were the challenges addressed?
9. Is there anything else that you would like to tell me about the process of recommending teachers for promotion?

Thank you for your participation in this interview

ANNEXURE C
SAMPLE OF INTERVIEW TRANSCRIPT
SCHOOL A

Date: 14 October 2016 Time : 11H30 VOICE CODE : PX 1

TRANSCRIPTS WITH PRINCIPAL X

Interviewee: Principal (pseudonym : voice of PX 1)

Interviewer: Research Student(Abbreviated : RS)

Interview set up and venue : Principal's Office,well ventilated,comfortable and no disruptions.

Summary of Preliminary Information:

- **Teaching experience**
 - **28 years**
- **Experience as Deputy Principal**
 - **2 years**
- **Experience as Principal**
 - **17 years**
- **Highest Qualifications**
 - **SPTD/Bed Hons**
- **Duties in the school**
 - **In charge of professional management of the school,that refers to day- to - day activities.In charge of curriculum management,time-tabling and class teaching.**
- **School description**
 - **Primary school in the township**
 - **1345 learners and 44 teachers**

Start of interview:

RS: Good morning Principal X, I am James Mhlongo,Masters in Education student with the University of Pretoria .I am currently doing a research on “**experiences of representatives of teachers’ unions and school principals in the promotion of educators**”. The information gathered will be kept confidential and you will remain anonymous. You are free to withdraw at any time during the interview if you feel uncomfortable.

PX1: Good morning sir, how are you? You still a book worm?

RS: I am fine, thanks for asking. I am a life –long learner my brother.Tell me about yourself.

PX1: I did my Senior Primary Teachers Diploma in 1987 with the East Rand College of Education. I started teaching in Mandlethu Primary School as a post level 1 educator in 1988.In 1996 I was promoted to be a Deputy Principal of the school. In 1999 I was appointed as principal till to date.

RS: Thank you Principal X. My next question, what can you say is your role in the interview process of teacher promotion?

PX1: The basic thing in the interview process, I have to be a resource person. I must make sure that all the laws regarding the appointment of educators are followed to the latter, that includes the Employment of Educators Act of 1998, South African Schools Act of 1996.I must guide the panel to ensure that the process is free and fair and is addressing the needs of the post and to ensure that the relevant person for the post is appointed.

RS: Tell me,how do you guide the panel to ensure that the process is free and fair?

PX1:I normally refer to what have been discussed on the workshop on interviews conducted just before doing the real job of interview process.I remind them to score the candidates according to the way they responded to questions.

RS: How can you rate yourself, where you successful in executing your duties to full potential?

PX1: Yes, successful, but not 100%, there was one post where the teacher union objected to our recommendation. The post advertised was for a Setswana, but most of the candidates that applied had no Setswana, teacher union objected that we cannot use Setswana as a yard stick, but should consider other subjects. The post was returned to the Nkangala District Education and was subsequently re-advertised and new candidates applied and appointed.

RS: Do you think the union was right in this case?Please explain.

PX1: I think the union was right,the requirement of the post wanted a person who can teach and manage Setswana.I think the union was spot on in this case and they were justified to declare a dispute.

RS: Did the dispute around the post affect the Culture of Teaching and Learning and Curriculum Management at the school?

PX1: Yes it did, as the post was not filled, the subject was not being properly managed. The management of that Setswana had to be shifted to another Head of Department (HOD) that means double job for that particular HOD.

RS: What is the role of representative of teacher union; also kindly provide names of unions involved?

PX1: In our area, the only participating union is the South African Democratic Teachers' Union (SADTU). In the past we did have NAPTOSA, but of late they do not attend even if they are invited. Their main legal role is to observe if everything is done correctly. In some cases if you are not careful enough, they will interfere and move away from observing and taking the role of participating, which is wrong. It will depend on the resource person (principal) and the chairperson of the panel whether they manage them or not. If you do not manage them they will definitely take over.

RS: Tell me more about how you manage them?

PX1: I manage the panel by reminding the union representatives that their role is to observe and not to interfere with the process. I remind them of what was discussed during the workshop prior to the interviews process. I also refer to Employment of Educators' Act of 1998.

RS: Is there any law or legislation that governs the role of observers in the process of interviews that you know of?

PX1: When the post is advertised there are directives issued in the gazette. It will state what the role of the panel is, role of the union representatives and who should make recommendations to the District Director who finally appoints the suitable or recommended candidate. The School Governing Body (SGB) recommends and the Director makes the final decision. If I may give an example, it is always not automatic that your recommendation will be carried as it is. We had a post last year (2015), we made recommendation as the panel and School Governing Body (SGB), the Director changed our recommendation and appointed the third candidate instead of the first candidate, but if you look at the directives in the gazette, he has those powers. The Director makes the final decision.

RS: I have heard you say "if you manage them", who must manage them?

PX1: The chairperson of the panel and the resource person (principal). Managing them is like reminding them of their role to just observe, if they have any objection they know what route to follow.

RS: Tell me more about this "route" to follow.

PX1: They must write a formal objection and submit to the District Director via the line function. They must do that within twenty four hours.

RS: Thank you very much. In your view what are some of the factors to consider when recommending educators for promotion?

PX1: When you look at an appointment of an educator for promotion, you have to look at his or her subjects' background, considering the subjects she or he is going to manage, is not about knowing the subject in full because he is not going to teach the subject. He or she is going to manage the subject. It is advisable that he or she manages the subjects she/he is teaching. If you look at the organogram of the Department of Education, you will find an educator who is managing four or five subjects, but in reality is teaching two subjects. The reason is that the post establishment is based on the number of learners you have. The subjects remain unchanged whether the enrolment is increasing or decreasing. The lesser the number of learners, the lesser the number of promotional posts. If you compare a school with six promotional posts to a school with two promotional posts, you will find that the school with two promotional, the School Management Team(SMT) is overloaded.

RS :Thank you Principal X.What do you do during the promotion interview process?

PX1: As an ex officio/resource person,the basic thing is to make sure that the whole process right from shortlisting to the final recommendation is within the pyramids of the legislation and the laws of education.Secondly you have to guide the panel.I will give you an example,the panel look at eloquent candidate,because of the way is expressing himself/herself,even though is not putting facts,he/she gives the panel an impression that he knows what he/she is talking about. The problem is,the panel is composed of parents who are not educated. The candidate will impress the panel by using bombastic words. Then you will find a candidate with a stage fright, but you can see that he/she knows what is talking about. He /she cannot express, that is where you guide the panel. The final decision comes from the panel you simply guide them. The second thing, to assist the panel to look at the curricular needs of the school, like I said there are not specialist in the curriculum, but as the principal you must assist them. For example to some parents if you say you be will looking for a Setswana educator, to them Sesotho and Sepedi may sound the same and it is totally different, that is where you come in as an educator. Some of the subjects are new, some parents did not do them, you have to brief them when you say NST (Natural Science and Technology) what do you mean. The last thing as a principal you do not score, but is the responsibility of the panel members.

RS: How do you guide the parents?

PX1: I guide the parents by telling them that they should not be impressed by the way a particular candidate's level of eloquence,but should look at whether he/she will execute the tasks assigned to him /her.

RS: Thank you very much Principal X .What do members of union representatives do during the interview process? You did mention SADTU,what do they really do?

PX1: The first thing you must make indications for them, from the process of shortlisting to the interviews themselves. They should be made aware of their role as observers, not

interfering with the process. The promotional posts are a challenge, the pyramid of the Education Department is such that you have one principal, four HOD and twenty educators and they all want to be principals. The union plays a critical role, because in the end they must declare whether the process was fair or not.

RS: Thank you Principal X. I am looking at the number of years that you have been in the School Management Team (SMT), having served as a Deputy Principal and now as a principal, at some stage you were delegated as a resource person to some schools in the Victor Khanye Circuit, where there are any challenges brought by the union that you have just mentioned?

PX1: Yes, in a school that I will not mention, the view of the panel was that candidate X is more suitable and should be recommended, but the union had another candidate in mind. They wanted to manipulate the process so that the candidate they prefer is considered for recommendation. As a resource person I noticed that a deadlock was reached, I stopped the process, and it was restarted (re-advertised). In the next interview, the new panel was appointed and I did not go there as a resource person because the process was delicate. The circuit manager went there personally.

RS: Do you think they were still observing?

PX1: They were out of line. They wanted their own member who was just eloquent, but out of tune with the discussion. They simply wanted to manipulate the process.

RS: Can you explain what you mean by out of tune?

PX1: By saying they are out of tune, I mean that they were breaking the interviews rules that state that they must observe not to influence the direction of who should be appointed.

RS: What are some of the challenges that you have experienced in the process of recommending teachers for promotion?

PX1: One of the basic challenges is the capacity of the SGB, they are not educators, they do not know the nitty gritty of the subjects at school. They look at the expression of the person, not what the person is saying. The secretary cannot capture everything as when he/she is writing. At some stage a tape recorder was recommended, but there are some candidates who are objecting to that, so that becomes a futile exercise.

RS: How were the challenges addressed?

PX1: Challenges could be addressed by applying the legislation. They should be managed using the legislation. It is better to stop the process rather than being manipulated.

RS: Is there anything else that you would like to tell me about the process of recommending teachers for promotion?

PX1 :Yes ,the first one is the structural one.Look at South African Police Services(SAPS) ,you can get eight captains in one police station(eight promotional posts).In the Department of Education you have one person called the principal and everybody is garning for that post,that creates the problem.There used to be Senior Teachers and Master Teachers,but that was stopped, it was a system to eliminate the challenges that we face.People were no longer fighting for promotional posts, but were looking at Senior Posts or Master Teachers. The Senior Teacher would get the same remuneration as a an HOD and Master teacher the same as the Deputy principal. The other thing ,we should keep good teachers in class and not try to make them managers,because most do fail as managers.

RS: In your opinion,what does it take to be a good manager?

PX1: Good manager is the one who execute his /her management tasks by delegating effectively and is a good communicator and who has emotional intelligence.The good manager must be able to plan ,organise,control and execute the tasks effectively.

RS:Principal X ,thank you for your time. I know you have meetings to attend to. The information gathered will be kept confidential and will not be divulged to any person. You will remain anonymous. The information will be kept by the University of Pretoria for 15 years,thereafter,it will be destroyed.

PX1: Thank you, I hope I have been of assistance.



ANNEXURE D

SAMPLE OF CODING TABLE

Questions and sub	Responses	Segments	Comments/codes	Themes/Sub
1. What can you say is your role in the interview process of teacher promotion?	<p>Teacher TRK 1 My role as teacher representative is to observe and to ensure that requirements of the post have been met and that the shortlisting and interview process is conducted in a free and fair manner. I also ensure that all the required documents are available and correctly completed. The documents include the Legality of the School Governing Body, Declaration of Confidentiality and the appointment of panel members. I also ensure that application forms received are made available to the panel.</p> <p>Teacher TRK2 I should indicate upfront that as an elected representative of teacher union, I am mandated by members of the union to</p>	<p>observe and to ensure that requirements of the post have been met and that the shortlisting and interview process is conducted in a free and fair manner.</p> <p>I also ensure all the required documents are available and correctly completed. The</p> <p>I am mandated by members of the union to represent them in the interview process where I am deployed by the Branch Executive.</p> <p>I am expected to observe that all</p>	<p>The representatives of teacher unions ensure that interviews procedures are free and fair and that there is no unfair discrimination</p> <p>Teacher union representatives used interviews processes for flexing their muscles and political posturing</p> <p>Teacher union representatives guard their members' interest</p>	<p>Post Profile</p> <p>Observer Status</p> <p>Political Grand standing</p> <p>Just Administrative Measures</p>



	<p>represent them in the interview process where I am deployed by the Branch Executive. I am expected to observe that all relevant processes are followed to the latter. I must ensure that a member participating in the interview process is not prejudiced in any way. I must also ensure that the post has been advertised following the correct procedures. For example, I must check that the post was advertised and given a reasonable time to elapse before interviews. I must further ensure that candidates were invited at seven days before the interview. I will oversee if shortlisting from long list was done according to stated policies. I must ensure that I was invited for both shortlisting and interview process well in advance. Over and above, being authorised by law and my union, I</p>	<p>relevant processes are followed to the latter.</p> <p>I will ensure substantive fairness is observed in the whole interview process.</p> <p>I must ensure that a member participating in the interview process is not prejudiced in any way.</p> <p>If processes are flouted, I won't hesitate to lodge a dispute and I must ensure that recommendations made are kept confidential.</p>	<p>The teacher representatives ensure that policies and relevant legislation are followed to the latter.</p> <p>Teacher union declare disputes in cases where they feel procedures and legislations are flouted</p> <p>Teacher representatives are the ones that declare that the interviews process was free and fair</p>	
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	<p>will ensure substantive fairness is observed in the whole interview process. It is my duty as an observer to ensure that the interview process is not flouted to the extent compromising the best candidate to the detriment of the African child and compromise to quality education in the education fraternity. If processes are flouted, I won't hesitate to lodge a dispute and I must ensure that recommendations made are kept confidential. The outcome of interview process should not be divulged prematurely .I must be offered an opportunity to comment at the end of the interview process to say that during my observation the process was free and fair.</p>	<p>at the end of the interview process to say that during my observation the process was free and fair</p>		
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ANNEXURE E
PROOF OF LANGUAGE EDITING

To whom it may concern

I confirm that I have edited the following M Ed dissertation of limited scope:
Perspectives held by teacher union representatives and principals of educator promotion interviews by J Mhlongo for language and technical aspects.



EM Lemmer

864 Justice Mohamed Street

Brooklyn 0181

11 May 2017