

**RECOGNITION OF COMPETENCE : AN EMPOWERMENT  
MODEL FOR THE RETENTION OF EXCELLENT  
TEACHERS IN THE CLASSROOM**

by

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## DECLARATION

I declare that this research report handed in herewith for the degree of Doctor of Philosophy at the University of Pretoria is, the researcher's independent work. It has not been submitted for a degree or examination before in this or any other university.

MAILE, SIMEON

\_\_\_\_\_

\_\_\_\_\_ day of \_\_\_\_\_ 2000.



## DEDICATION

In memory of my late mother, Daisy Lesamang Maile, who inspired and nurtured me to love and believe in competence as a catalyst for perfection. She was a paragon of excellence in leadership.



**TOPIC: RECOGNITION OF COMPETENCE : AN EMPOWER-  
MENT MODEL FOR THE RETENTION OF  
EXCELLENT TEACHERS IN THE CLASSROOM**

**ACKNOWLEDGEMENTS**

**SUMMARY**

**TABLE OF CONTENTS**

**LIST OF TABLES**

**LIST OF FIGURES**

**LIST OF ACRONYMS**

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## **SUMMARY**

**TITLE: RECOGNITION OF COMPETENCE : AN EMPOWERMENT  
MODEL FOR THE RETENTION OF EXCELLENT TEACHERS  
IN THE CLASSROOM**

**CANDIDATE: MAILE, SIMEON**

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**DEGREE: PHILOSOPHIAE DOCTOR**

It is established in this research project that recognition of competence does not begin when a person takes on employment. For reasons alluded to in this project, it begins when a candidate is selected for initial teacher education and training. However, recognition of competence is a model that applies different methods or modes of recognition. These methods have been identified, their differences are indicated and the variations used according to the level of competence are clarified as well.

Recognition of competence represents a new way of managing human resources in education. It is a model which emerges from paradigm shifts and the need for quality service in education. This model includes mechanisms of managing quality and standards such as the South African Qualifications Authority, National Qualifications Framework, National Standards Bodies, Standard Generating Bodies and Education and Training Qualifications Authority.

The researcher identified key areas of success in the present and erstwhile recognition systems. However, it was found that these systems were inadequate for the retention of teachers. In a bid to search for solutions, the research unravelled recognition systems used in the private sector. Literature study revealed, in this regard, that there are inadequacies as well. The system in the private sector was severely affected by policies of the past dispensation. Nevertheless, it seems recognition of competence is well on its early stages in the education sector. Consequently, there is an emphasis on competencies to advance South Africa in world markets.

The challenge of raising standards so as to make South Africa competitive begins with empowerment and capacity building. Empowerment and capacity building are complementary approaches in recognition of competence. These approaches recognise the inadequacies and disparities of the past. It is from this consideration that the fundamentals of recognition of competence are refocused on levelling the playing fields. In each case, the approaches are evaluated by pointing out the advantages and disadvantages.

In order to establish the basis from literature review, the researcher used empirical research. Consequently, the theories on recognition of competence, empowerment and capacity building were complemented and verified by unravelling the real situation. Interviews and surveys were conducted. The findings reveal that there are a myriad of challenges and problems that still plague education. The researcher suggested guidelines to overcome the challenges and problems. Finally, whilst it is acknowledged that there are some good initiatives from the Department of Education, much is still to be done with regard to recognition of competence. The researcher made conclusions, recommendations on how to navigate our way out of these problems, and pointed out areas that need further research.



## KEY WORDS

Recognition of competence

Empowerment

Capacity building

Motivation

Partnerships

Competence development

Transformation

Affirmative action

Paradigm shift

Quality and standards

Recruitment and selection

Reward system

Education human resources management

Redeployment and rationalisation

## OPSOMMING

**TITEL: ERKENNING VAN BEVOEGDHEID: 'N BEMAGTIGINGS-  
MODEL VIR DIE BEHOUD VAN UITSTEKENDE ONDER-  
WYSERS IN DIE KLASKAMER**

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**GRAAD: PHILOSOPHIAE DOCTOR**

In hierdie navorsingsprojek is vasgestel dat die erkenning van bekwaamheid nie eers begin wanneer 'n persoon aangestel word nie. Weens redes waarna verwys word in hierdie projek, begin dit reeds wanneer 'n kandidaat gekeur word vir aanvanklike onderwysopleiding. Die erkenning van bevoegdheid is egter 'n model wat verskillende metodes of vorme van erkenning aanwend. Hierdie metodes word geïdentifiseer; verskille tussen die metodes word aangedui, en die variasies wat gebruik word na aanleiding van die vlak van bevoegdheid word duidelik uitgespel.

Die erkenning van bevoegdheid verteenwoordig 'n nuwe manier om menslike hulpbronne in die onderwys te bestuur. Die model spruit voort uit paradigma-verskuiwings en die behoefte aan kwaliteit dienslewering in die onderwys. Hierdie model sluit meganismes in om kwaliteit en standarde te bestuur, soos byvoorbeeld die Suid-Afrikaanse Kwalifikasie Owerheid ("South African Qualifications Authority" or **SAQA**), die Nasionale Kwalifikasie Raamwerk ("National Qualifications Framework" or **NQF**), Nasionale Standaard-Liggame ("National Standards Bodies" or **NSB's**), Standaard-Ontwikkelingsliggame ("Standard Generating Bodies" or **SGB's**) en die Onderwys en Opleiding Kwalifikasie Owerheid ("Education and Training Qualifications Authority" or **ETQA**).



Die navorser het sleutelareas van sukses in die hedendaagse en voormalige stelsels van erkenning geïdentifiseer. Daar is egter bevind dat hierdie stelsels ontoereikend is om onderwysers te behou. In 'n poging om oplossings te vind is navorsing onderneem oor die erkenningstelsels wat in die privaatsektor gebruik word. Literatuurstudie het getoon dat daar in hierdie verband ook ontoereikendhede voorkom. Die stelsel in die privaatsektor is nadelig beïnvloed deur die beleid van die vorige bedeling. Dit lyk nieteenstaande asof die erkenning van bevoegdheid goed op dreef is in die onderwyssektor. Gevolglik word die klem geplaas op bevoegdheids om Suid-Afrika se posisie in wêreldmarkte te verbeter.

Die uitdaging om standarde te verhoog, met die doel om Suid-Afrika mededingend te maak, begin met bemagtiging en die opbouing van kapasiteit. Bemagtiging en die uitbou van kapasiteit is aanvullende benaderings in die erkenning van bevoegdheid. Hierdie benaderings gee toe dat daar in die verlede ontoereikendhede en teenstrydighede bestaan het. Dit is vanuit hierdie oorweging dat die grondbeginsels van die erkenning van bekwaamheid in heroorweging geneem word, noudat die ongelykhede uit die weg geruim is. In elke geval word die benaderings geëvalueer deur die voor- en nadele daarvan uit te wys.

Om op die grondslag van 'n literatuuroorsig te bou het die navorser van empiriese navorsing gebruik gemaak. Gevolglik is die teorieë oor die erkenning van bevoegdheid, bemagtiging en die uitbouing van kapasiteit aangevul en geverifieer deur die werklike situasie te ondersoek. Onderhoude en opnames was deel van die ondersoek. Die bevindinge toon dat daar vele uitdagings en probleme is wat steeds die onderwyssektor kortwiek. Die navorser het riglyne voorgestel om hierdie uitdagings en probleme te kan oorkom. Laastens, terwyl daar toegegee word dat daar reeds goeie inisiatiewe van die kant van die Departement van Onderwys bestaan, is daar steeds baie wat verrig moet word ten opsigte van die erkenning van bevoegdheid. Die navorser het gevolgtrekkings en aanbevelings vir verdere hantering van probleme gemaak, en ook terreine wat verdere navorsing vereis uitgewys.



## SLEUTELBEGRIPPE

Erkenning van bevoegdheid

Bemagtiging

Kapasiteitsbou

Motivering

Vennootskappe

Ontwikkeling van bevoegdhede

Hervorming

Regstellende aksie

Paradigma-verskuiwing

Kwaliteit en standarde

Werwing en keuring

Beloningssteeem

Menslike hulpbronbestuur  
in die onderwys

Herontplooiing en rasionalisasie

## CHAPTER ONE

### TABLE OF CONTENTS

	Page
<b>1. INTRODUCTION, ORIENTATION, PROBLEM STATEMENT, RESEARCH PROGRAMME</b>	<b>1</b>
<b>1.1. INTRODUCTION</b>	<b>1</b>
<b>1.2. ORIENTATION</b>	<b>2</b>
1.2.1. The context of the research	2
1.2.2. Relating the study to Education Management	3
1.2.3. Demarcation of the study	6
<b>1.3. PROBLEM STATEMENT</b>	<b>7</b>
<b>1.4. AIMS AND OBJECTIVES OF THE RESEARCH</b>	<b>8</b>
1.4.1. Aims	9
1.4.2. Objectives	9
<b>1.5. RESEARCH METHODS</b>	<b>10</b>
<b>1.6. CLARIFICATION OF CONCEPTS</b>	<b>10</b>
1.6.1. Recognition	11
1.6.2. Competence	12
1.6.3. Empowerment	15
1.6.4. Model	15
1.6.5. Retention	16
1.6.6. Excellent Teachers	16
<b>1.7. RESEARCH PROGRAMME</b>	<b>19</b>
1.7.1. Flowchart of the Research	19
1.7.2. Brief description of critical outcomes	20
1.7.2.1. Chapter One : Introduction	20
1.7.2.2. Chapter Two : Recognition of Competence	20
1.7.2.3. Chapter Three : Empowerment and Capacity Building	20
1.7.2.4. Chapter Four : Method of Investigation	21
1.7.2.5. Chapter Five : Discussion, Analysis and Guidelines	21
1.7.2.6. Chapter Six : Conclusions and Recommendations	21
<b>1.8. SUMMARY</b>	<b>22</b>

## CHAPTER TWO

	Page
<b>2. RECOGNITION OF COMPETENCE FOR THE RETENTION OF TEACHERS IN THE CLASSROOM</b>	
<b>2.1. INTRODUCTION</b>	23
<b>2.2. RECOGNITION OF COMPETENCE</b>	26
2.2.1 Origin of competency-based approach	26
2.2.1. Components of competence	29
2.2.2. Objectives for the Recognition of Competence	32
2.2.3. National Qualifications Framework (NQF)	33
2.2.3.1. Definition and Orientation	33
2.2.3.2. Career Progression and Qualifications	41
2.2.3.3. A new approach to norms and standards	44
2.2.3.4. The levels, bands and fields of the NQF	46
2.2.3.5. Governing the NQF	49
<b>2.3. RECOGNITION OF COMPETENCE AND HUMAN RESOURCES MANAGEMENT</b>	55
2.3.1. Educational Challenges	55
2.3.2. Competency-based approach to recruitment and selection	58
2.3.3. Job analysis and staffing needs	61
2.3.3.1. Curriculum and management requirements	63
2.3.3.2. Forecasting student enrolment	64
2.3.4. Tenure for professional personnel	68
2.3.4.1. Tenure process	69
2.3.4.2. Methods of obtaining tenure	71
2.3.5. Redeployment and retention of teachers	74
2.3.5.1. Macro-external factors	74
2.3.5.2. Micro-organisational constraints	81
2.3.5.3. Redeployment and retention processes	85
2.3.6. Teacher attrition	95
2.3.6.1. Reasons associated with attrition	95
<b>2.4. REWARDING AND VALUING</b>	96
2.4.1. Attraction of qualified teachers	97
2.4.2. Retention of Excellent Teachers	98

<b>2.4.3. Current Forms of Incentives in Schools</b>	<b>100</b>
2.4.3.1. Motivational factors	100
2.4.3.2. Incentives applied in schools	100
2.4.3.3. Variables affecting rewards	103
<b>2.4.4. Incentives in the private sector</b>	<b>105</b>
<b>2.4.5. Career paths and recognition of competence</b>	<b>108</b>
2.4.5.1. The teacher's career	108
2.4.5.2. Career path model for the retention of teachers	109
2.4.5.3. Performance Related Pay (PRP)	115
<b>2.5. PERTINENT ISSUES IN THE RECOGNITION OF COMPETENCE</b>	<b>119</b>
<b>2.5.1. Recognition of competence and the disadvantaged</b>	<b>119</b>
2.5.1.1. Anti-male Bias Recognition	121
2.5.1.2. Recognition of competence for the disabled	127
<b>2.5.2. Organisational management and recognition of         Competence</b>	<b>131</b>
2.5.2.1. The work satisfaction of teachers	131
2.5.2.2. Management as a potential source of Dissatisfaction	135
2.5.2.3. Career success	137
2.5.2.4. Teacher unrest	138
<b>2.6. CONCLUSION</b>	<b>140</b>

**CHAPTER THREE**

	<b>Page</b>
<b>3. EMPOWERMENT AND CAPACITY BUILDING AS A MEANS TO RETAIN TEACHERS IN THE CLASSROOM</b>	
<b>3.1. INTRODUCTION</b>	<b>142</b>
<b>3.2. EMPOWERMENT</b>	<b>143</b>
3.2.1. Aims and perspectives of empowerment	143
3.2.2. Objectives	149
3.2.3. Empowerment logic	150
3.2.3.1. Paradigm shift	150
3.2.3.2. Empowerment and capacity building	155
3.2.4. Empowerment programmes	156
3.2.4.1. Site-based management (SBM)	156
3.2.4.2. Empowering partnerships	161
3.2.4.3. Joint decision making	182
3.2.5. Empowerment models	185
3.2.5.1. Orientation	185
3.2.5.2. Lifelong learning	186
3.2.5.3. Human development	190
3.2.5.4. Professional and competence development	194
3.2.5.5. Induction	200
<b>3.3. CAPACITY BUILDING</b>	<b>211</b>
3.3.1. Orientation	211
3.3.2. Capacity building outcomes and basic requirements	213
3.3.3. The legacy of apartheid	217
3.3.3.1. The education management legacy	217
3.3.3.2. The legacy of allocation of resources	218
3.3.3.3. The gender legacy	224
3.3.3.4. The legacy in training and development	225
3.3.4. Capacity building programmes	226
3.3.4.1. Anti-discrimination programme	226
3.3.4.2. Equity for all	228
3.3.4.3. Equity	230
3.3.4.4. Affirmative action	231

<b>3.3.4.5. Diversity management</b>	<b>232</b>
<b>3.3.5. Capacity building quality contributors</b>	<b>233</b>
<b>3.3.5.1. Accountability</b>	<b>234</b>
<b>3.3.5.2. Building professional capital</b>	<b>236</b>
<b>3.3.5.3. Managing teacher's behaviour</b>	<b>237</b>
<b>3.3.5.4. Education for nation building</b>	<b>238</b>
<b>3.4. CONCLUSION</b>	<b>239</b>

## CHAPTER FOUR

	Page
<b>4. METHOD OF INVESTIGATION</b>	
<b>4.1. INTRODUCTION</b>	240
<b>4.2. METHODOLOGICAL CONSIDERATIONS</b>	241
4.2.1. Literature study	241
4.2.2. The survey method	242
<b>4.3. AIMS</b>	243
<b>4.4. TARGET GROUP FOR THE INVESTIGATION</b>	243
<b>4.5. RESEARCH METHODS</b>	243
4.5.1. Questionnaire as a Method of Research	243
4.5.1.1. Questionnaire construction	243
4.5.1.2. Structures questionnaire	248
4.5.1.3. The self-administered questionnaire	249
4.5.2. Interview	251
4.5.2.1. Informal interviews	251
4.5.2.2. Advantages of informal interviews	252
4.5.2.3. Disadvantages of informal interviews	253
<b>4.6. REPORT ON INFORMAL INTERVIEWS</b>	253
4.6.1. Opinions of heads of department	254
4.6.2. Opinions of principals or deputy principals	256
<b>4.7. FINDINGS FROM THE SURVEY</b>	260
4.7.1. Introduction	260
4.7.2. Coding and scoring	260
4.7.3. Presentation, analysis and interpretation of results	261
4.7.4. Most important findings from the empirical survey	300
<b>4.8. CONCLUSION</b>	302

**CHAPTER FIVE**

	<b>Page</b>
<b>5. GUIDELINES FOR THE RECOGNITION OF COMPETENCE AS AN EMPOWERMENT MODEL TO RETAIN EXCELLENT TEACHERS IN THE CLASSROOM</b>	
5.1. INTRODUCTION	304
5.2. DISCUSSION AND ANALYSIS OF THE FINDINGS	304
5.2.1. Findings from literature study	304
5.2.1.1. Recognition of competence	304
5.2.1.2. Empowerment and capacity building	306
5.3. GUIDELINES	307
5.3.1. Recognition of competence	307
5.3.1.1. Ways of recognising competence	307
5.3.1.2. Guidelines for effective recognition	310
5.3.1.3. Building a culture of recognition	313
5.3.1.4. School climate	315
5.3.1.5. Leadership for recognition of competence	316
5.3.1.6. Motivational factors	317
5.3.2. Empowerment and capacity building	318
5.3.2.1. Making democratic quality decisions	318
5.3.2.2. Competency-based development and training	322
5.3.2.3. Strategies for competency-based development	332
5.3.2.4. Power sharing guidelines	335
5.3.2.5. Managing resources equitably	338
5.3.2.6. Affirmative action	340
5.3.3. Retention guidelines	343
5.3.3.1. The probationary period	344
5.3.3.2. The tenure privilege	345
5.3.3.3. Bilateral agreements with unions	346
5.3.3.4. Provincial budget reviews	347
5.3.3.5. Local appointments	349
5.3.3.6. Redeployment	349
5.3.3.7. Rationalisation	352
5.3.3.8. Voluntary severance packages	354
5.4. CONCLUSION	356



**LIST OF TABLES**

		<b>Page</b>
1.	<b>Table 1.1: Educator qualifications by province, 1998.</b>	<b>7</b>
2.	<b>Table 2.1: Framework for examining types of teaching competence</b>	<b>25</b>
3.	<b>Table 2.2: Teacher competencies</b>	<b>31</b>
4.	<b>Table 2.3: Proposed structure for an NQF.</b>	<b>35</b>
5.	<b>Table 2.4: Teacher education offered by institutions</b>	<b>42</b>
6.	<b>Table 2.5: REQV structure</b>	<b>43</b>
7.	<b>Table 2.6: NQF Fields</b>	<b>48</b>
8.	<b>Table 2.7: Post provisioning expressed as educator-learner ratios in the Northern Province</b>	<b>66</b>
9.	<b>Table 2.8: Weightings from the post-provisioning model</b>	<b>87</b>
10.	<b>Table 3.1: Roles of team members</b>	<b>168</b>
11.	<b>Table 3.2: Advantages and Disadvantages</b>	<b>181</b>
12.	<b>Table 3.3: A comparison of behaviorist and humanistic approaches</b>	<b>191</b>
13.	<b>Table 3.4: Capacity building in the Ministry of Education</b>	<b>215</b>
14.	<b>Table 3.5: Educators according to Rank and Gender 1994</b>	<b>224</b>
15.	<b>Table 6.1: Summary of the recommendations</b>	<b>386</b>

**LIST OF FIGURES**

	<b>Page</b>
1. <b>Figure 1.1: Recognition of competence as an aspect of Education Management</b>	<b>5</b>
2. <b>Flowchart of the research</b>	<b>19</b>
3. <b>Figure 2.1: Linking academic, professional and occupational requirements</b>	<b>45</b>
4. <b>Figure 2.2: Bodies responsible for academic qualifications</b>	<b>54</b>
5. <b>Figure 2.3: A competency-based model of recruitment and Selection</b>	<b>61</b>
6. <b>Figure 2.4: Procedure for rationalisation</b>	<b>83</b>
7. <b>Figure 2.5: Identifying post in excess</b>	<b>90</b>
8. <b>Figure 2.6: Flow Chart C : Identifying Educators in excess</b>	<b>93</b>
9. <b>Figure 2.7: Redeployment of educators</b>	<b>94</b>
10. <b>Figure 2.8: Hierarchical structure of compensation</b>	<b>110</b>
11. <b>Figure 2.9: Managing work and teaching work in the school</b>	<b>111</b>
12. <b>Figure 2.10: Career paths for teachers</b>	<b>112</b>
13. <b>Figure 2.11: Dual career ladder</b>	<b>113</b>
14. <b>Figure 2.12: Discrimination in recruitment and selection</b>	<b>125</b>
15. <b>Figure 3.1: Number of schools according to condition of buildings (National)</b>	<b>219</b>
16. <b>Figure 3.2: Provision of resources to schools (National)</b>	<b>221</b>
17. <b>Figure 3.3: Learner-classroom ratio (National)</b>	<b>222</b>
18. <b>Figure 3.4: Educator-classroom ratio (National)</b>	<b>223</b>
19. <b>Figure 5.1: Experiential learning cycle</b>	<b>314</b>
20. <b>Figure 5.2: The decision making process</b>	<b>321</b>
21. <b>Figure 5.3: The development cycle</b>	<b>325</b>
22. <b>Figure 5.4: The resource management cycle</b>	<b>338</b>
23. <b>Figure 6.1: Career ladders for teachers</b>	<b>379</b>

## LIST OF ABBREVIATIONS AND ACRONYMS

<b>ABET</b>	-	<b>Adult Basic Education and Training</b>
<b>AIDS</b>	-	<b>Acquired immunodeficiency syndrome</b>
<b>ANC</b>	-	<b>African National Congress</b>
<b>CAS</b>	-	<b>Counselling and Advisory Services</b>
<b>CBET</b>	-	<b>Competency-based Education and Training</b>
<b>CD/ROM</b>	-	<b>Compact disc read-only memory</b>
<b>CD-I</b>	-	<b>Compact disc – interactive</b>
<b>COSATU</b>	-	<b>Congress of South African Trade Unions</b>
<b>CSS</b>	-	<b>Central Statistical Service</b>
<b>DVI</b>	-	<b>Digital video-interactive</b>
<b>EEA</b>	-	<b>Employment of Educators' Act, 1998</b>
<b>ELRC</b>	-	<b>Education Labour Relations Council</b>
<b>EMD</b>	-	<b>Education management development</b>
<b>EMIS</b>	-	<b>Education Management Information Systems</b>
<b>ETQA</b>	-	<b>Education and Training Qualifications Authority</b>
<b>FET</b>	-	<b>Further Education and Training</b>
<b>GDP</b>	-	<b>Growth Domestic Product</b>
<b>GEAR</b>	-	<b>Growth, Employment and Redistribution strategy</b>
<b>GEPF</b>	-	<b>Government employees pension fund</b>
<b>HBI</b>	-	<b>Historically Black Institutions</b>
<b>HE</b>	-	<b>Higher Education</b>
<b>HIV</b>	-	<b>Human immunosuppressive virus</b>
<b>HODs</b>	-	<b>Heads of Departments</b>
<b>HRM</b>	-	<b>Human resources management (managers)</b>
<b>HSRC</b>	-	<b>Human Sciences Research Council</b>
<b>HWI</b>	-	<b>Historically White Institutions</b>
<b>IMF</b>	-	<b>International Monetary Fund</b>
<b>INSET</b>	-	<b>In-service teacher education</b>
<b>IVD</b>	-	<b>Interactive videodisc</b>
<b>LIFO</b>	-	<b>Last-In-First-Out</b>
<b>LRA</b>	-	<b>Labour Relations Act, 1995</b>

<b>MED</b>	-	<b>Member of the Executive Council</b>
<b>NASSP</b>	-	<b>National Association of Secondary School Principals</b>
<b>NCESS</b>	-	<b>National Committee for Education Support Services</b>
<b>NCHE</b>	-	<b>National Commission on Higher Education</b>
<b>NCSNET</b>	-	<b>National Commission on Special Needs in Education and Training</b>
<b>NGOs</b>	-	<b>Non-governmental organisations</b>
<b>NP</b>	-	<b>National Party</b>
<b>NQF</b>	-	<b>National Qualifications Framework</b>
<b>NSBs</b>	-	<b>National Standards Bodies</b>
<b>PED</b>	-	<b>Provincial Education Department</b>
<b>PRESET</b>	-	<b>Pre-service teacher education</b>
<b>PRISEC</b>	-	<b>Private Sector Education Council</b>
<b>PRP</b>	-	<b>Performance-related-pay</b>
<b>PSCBC</b>	-	<b>Public Service Co-ordinating Bargaining Council</b>
<b>PTT</b>	-	<b>Provincial Task Team</b>
<b>RAU</b>	-	<b>Randse Afrikaanse Universiteit</b>
<b>RDP</b>	-	<b>Reconstruction and Development Programme</b>
<b>REQV</b>	-	<b>Relative Education Qualification Value</b>
<b>RSA</b>	-	<b>Republic of South Africa</b>
<b>SACE</b>	-	<b>South African Council for Educators</b>
<b>SADTU</b>	-	<b>South African Democratic Teachers' Union</b>
<b>SAPs</b>	-	<b>Structural adjustment programmes</b>
<b>SAQA</b>	-	<b>South African Qualifications Authority</b>
<b>SASA</b>	-	<b>South African Schools Act, 1996</b>
<b>SBM</b>	-	<b>Site-based management</b>
<b>SGB</b>	-	<b>School Governing Body</b>
<b>SGBs</b>	-	<b>Standard Generating Bodies</b>
<b>SMS</b>	-	<b>Self-managing schools</b>
<b>TB</b>	-	<b>Tuberculosis</b>
<b>TBVC</b>	-	<b>Transkei, Bophuthatswana, Venda and Ciskei (Former Independent Homelands)</b>
<b>TQM</b>	-	<b>Total Quality Management</b>
<b>UIF</b>	-	<b>Unemployment insurance fund</b>

- UK** - **United Kingdom of Great Britain**
- UP-CSIR** - **University of Pretoria – Centre for Scientific and Industrial Research**
- USA** - **United States of America**
- VSP** - **Voluntary severance package**

## CHAPTER ONE

### 1. INTRODUCTION, ORIENTATION, PROBLEM STATEMENT, RESEARCH PROGRAMME

#### 1.1 INTRODUCTION

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

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

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

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

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

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

## **1.2 ORIENTATION**

### **1.2.1 The context of the research**

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

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

### **1.2.2 Relating the study to Education Management**

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

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

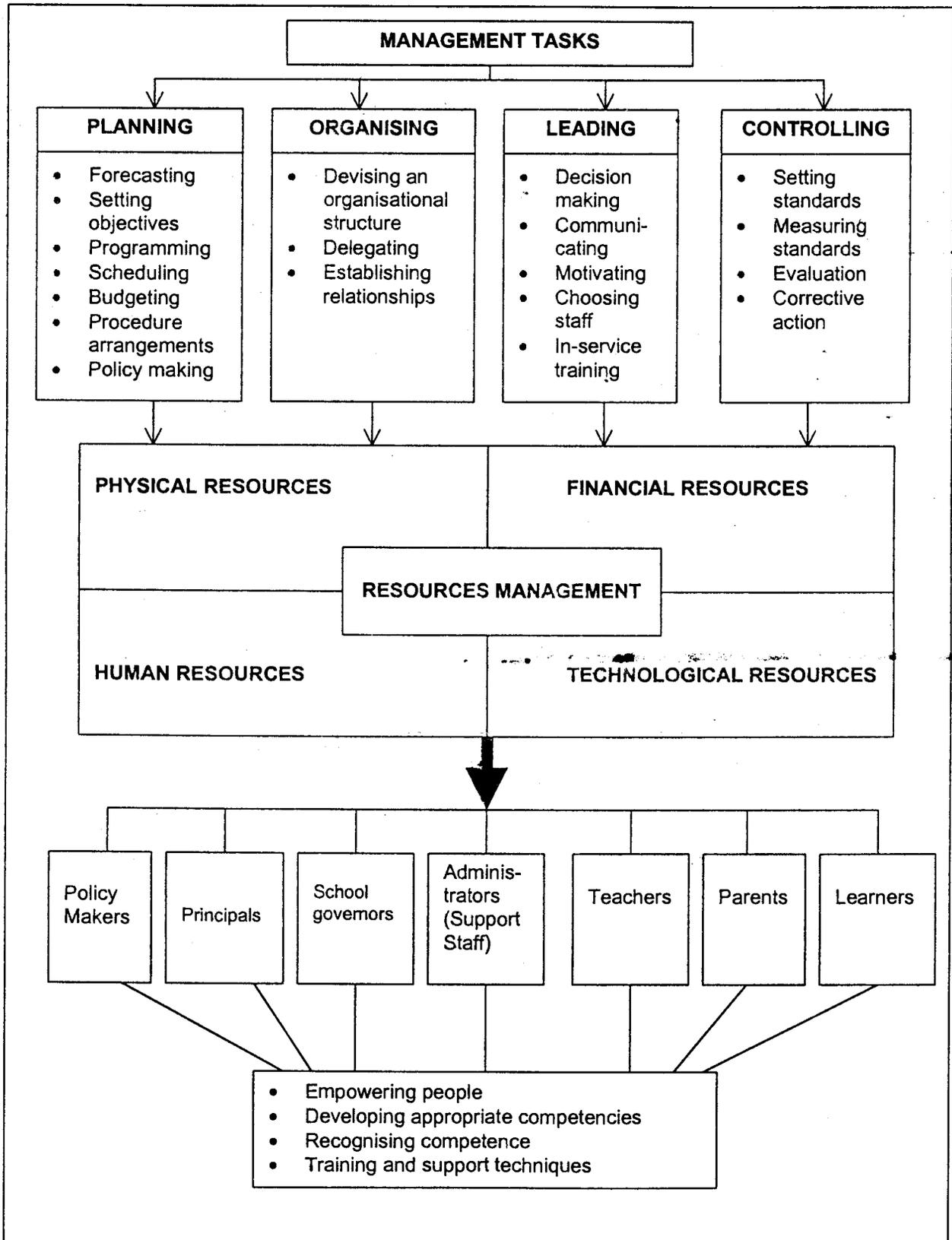
Marais and Bondesio in Garbers (1996:144-115) defined Management according to its components, functions and comparison to leadership. Van der Westhuizen (1991:55) defines education management as "a specific type of work in education which comprises those regulative tasks or actions executed by a person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

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

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

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

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



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

### **1.2.3 Demarcation of the study**

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

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

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

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

### 1.3 PROBLEM STATEMENT

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

**Table 1.1: Educator qualifications by province, 1998**

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

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

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

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

#### **1.4 AIMS AND OBJECTIVES OF THE RESEARCH**

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

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

#### **1.4.1 Aims**

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

#### **1.4.2 Objectives**

The following objectives can be realised through research:

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



## **1.5 RESEARCH METHODS**

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

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

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

## **1.6 CLARIFICATION OF CONCEPTS**

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

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

### 1.6.1 Recognition

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

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

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

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

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

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

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

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

### 1.6.2 Competence

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

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

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

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

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

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

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

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

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

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

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

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

### 1.6.3 Empowerment

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

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

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

To teachers empowerment means

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

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

### 1.6.4 Model

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

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

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

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

#### **1.6.5 Retention**

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

#### **1.6.6 Excellent Teachers**

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

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

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

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

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

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

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

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

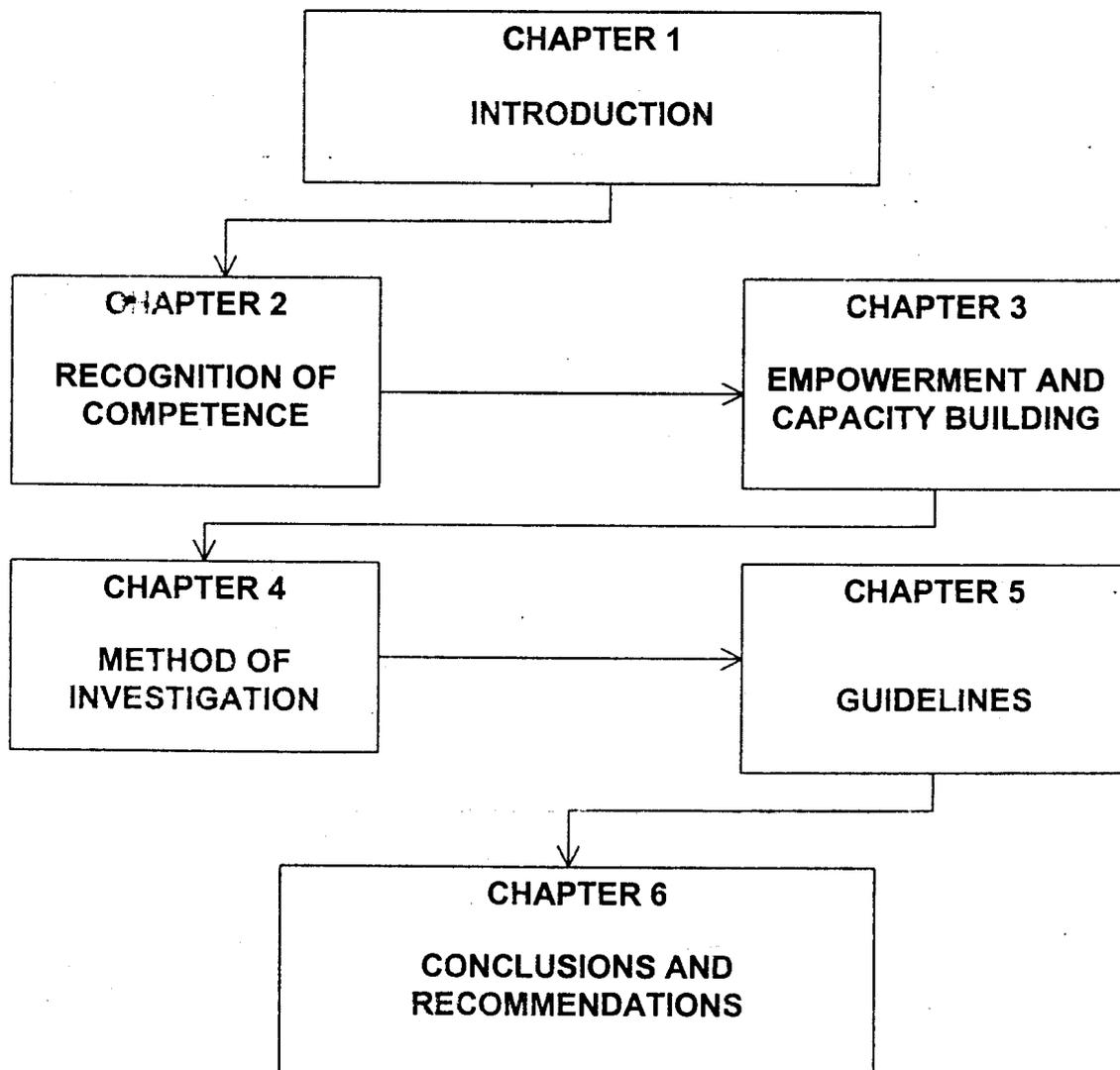
Of course, no individual would possess an equal measure all these personal qualities. An average excellent teacher would exhibit a minimum of these attributes.



## 1.7 RESEARCH PROGRAMME

The research programme can be delineated in the following diagram:

### 1.7.1 Flowchart of the research



## **1.7.2 Brief description of critical outcomes**

### **1.7.2.1 CHAPTER ONE**

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

### **1.7.2.2 CHAPTER TWO**

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

### **1.7.2.3 CHAPTER THREE**

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

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

**1.7.2.4 CHAPTER FOUR**

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

**1.7.2.5 CHAPTER FIVE**

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

**1.7.2.6 CHAPTER SIX**

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

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## 1.8 SUMMARY

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

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

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

## CHAPTER TWO

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

#### 2.1 INTRODUCTION

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

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



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

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

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

**Table 2.1 Framework for Examining Four Types of Teaching Competence**

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

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

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

## **2.2 RECOGNITION OF COMPETENCE**

### **2.2.0 Origin of competency-based approach**

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

#### **(a) The United States of America (USA)**

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

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

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

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

(b) The United Kingdom (UK)

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

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

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

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

(c) New Zealand

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

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

(d) South Africa

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

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

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

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

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

### **2.2.1 Components of Competence**

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

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

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

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

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

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

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

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

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

**Table 2.2 Teacher competencies**

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

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

### **2.2.2 Objectives for the Recognition of Competence**

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

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

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

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

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

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

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

### **2.2.3 National Qualifications Framework (NQF)**

#### **2.2.3.1 Definition and Orientation**

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

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

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

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

Table 2.3 : Proposed structure for an NQF

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

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

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

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

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

(a) Inefficiencies of South Africa's Education System

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

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

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

(b) Changing Social Demands

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

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

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

(c) New Economic Realities

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

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

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

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

(d) Responsiveness to Diversity

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

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

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

(e) The Demand for Quality

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

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

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

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

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

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

### **2.2.3.2 Career Progression and Qualifications**

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

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

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

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



**Table 2.4 Teacher education offered by institutions**

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

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

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

Table 2.5: REQV Structure

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

Source: ELRC (1997: 4-5)

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

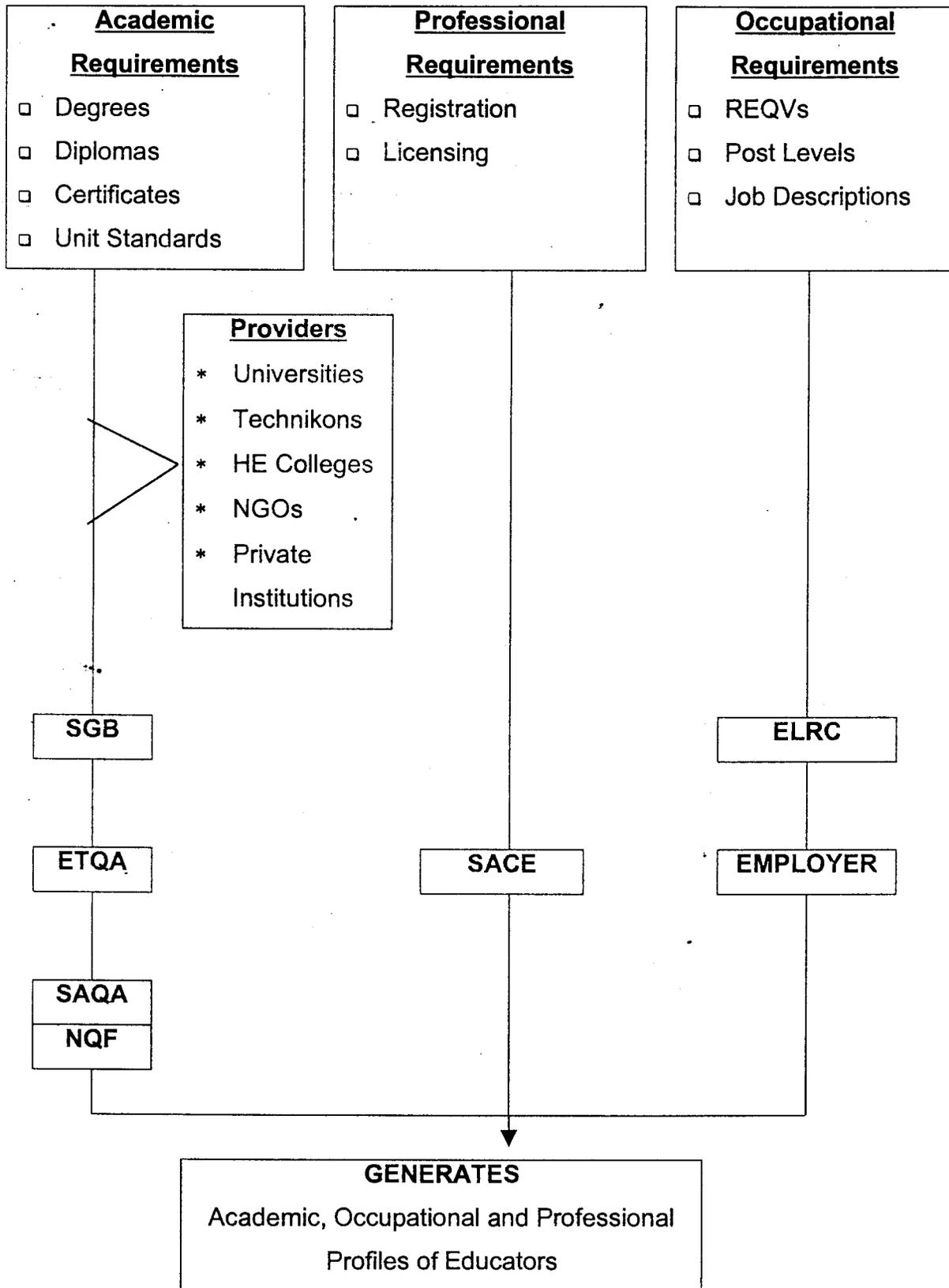
attending workshops, conferences and subject association meetings, involvement in curriculum development or course material writing, or acting in senior post (Department of Education, 1997 : 126).

### **2.2.3.3 A new approach to Norms and Standards**

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

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

**Figure 2.1 Linking academic, professional and occupational requirements**



#### **2.2.3.4 The levels, bands and fields of the NQF**

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

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

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

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

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

Consequently, the recognition provided by NQF will

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

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

**Table 2.6: NQF Fields**

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

**Source: Department of Education (1996:35)**

### 2.2.3.5 *Governing the NQF*

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

(a) The South African Qualifications Authority (SAQA)

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

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

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

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

The functions of SAQA are in essence to

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

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

(b) National Standards Bodies (NSBs)

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

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

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

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

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

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

ETQAs could be established on the basis of:

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

The functions of the ETQAs are to ensure:

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

The SGBs are established to perform the following functions:

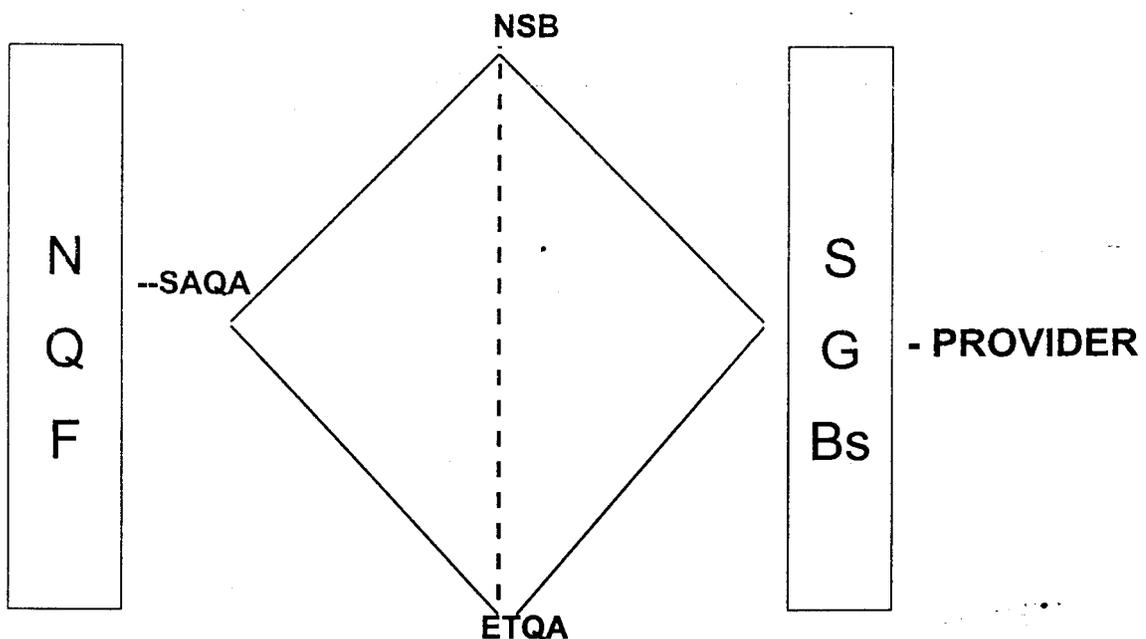
- (i) generate unit standards and qualifications in accordance with SAQA requirements in identified sub-fields and levels;
- (ii) update and review standards;
- (iii) recommend unit standards and qualifications to NSBs; and
- (iv) other functions as may from time to time be delegated by SAQA.

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

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

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

Figure 2.2: Bodies responsible for academic qualifications



## 2.3 RECOGNITION OF COMPETENCE AND HUMAN RESOURCES MANAGEMENT

### 2.3.3 Educational Challenges

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

### **2.3.2 Competency-based Approach to Recruitment and Selection**

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

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

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

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

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

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

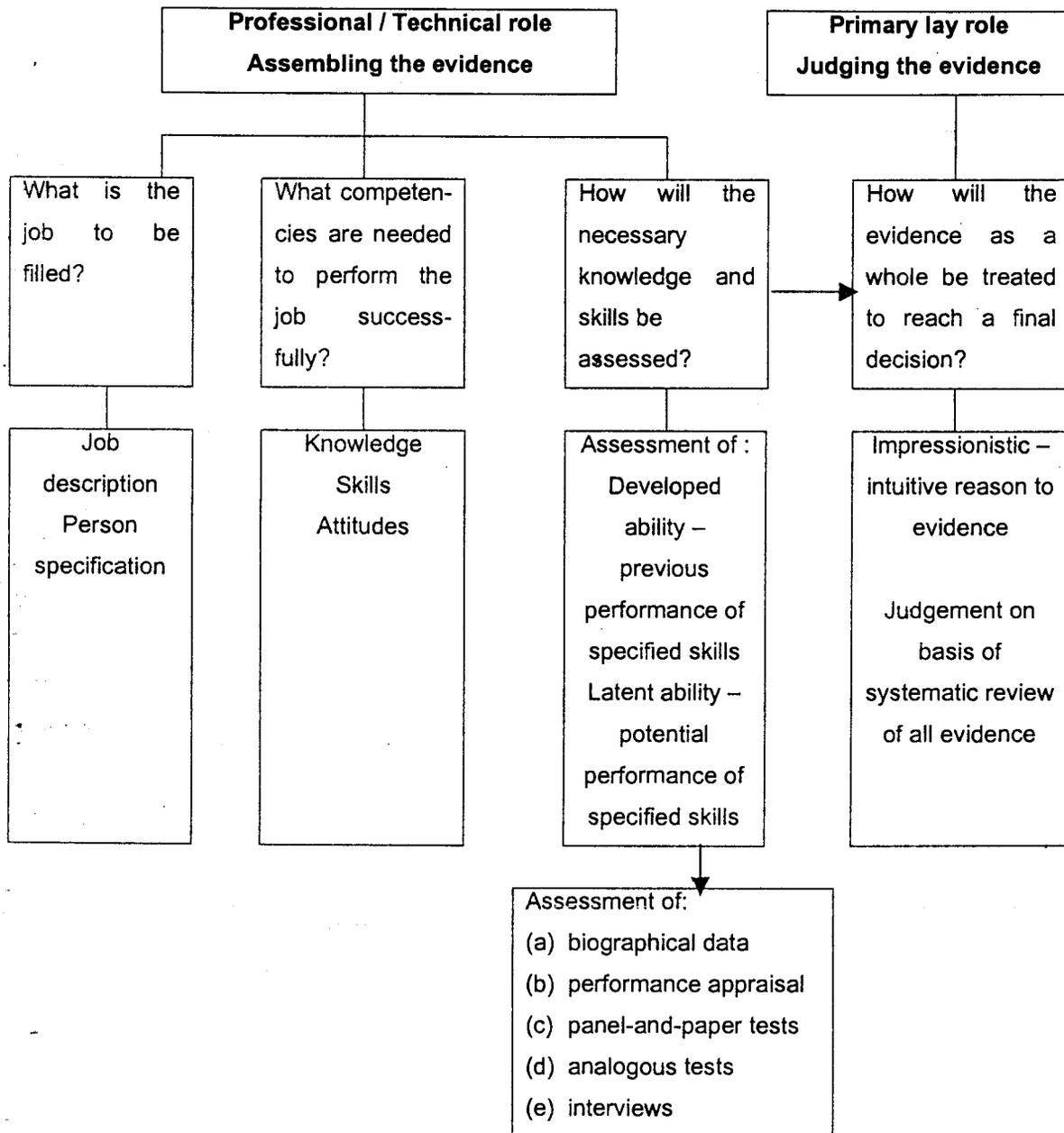
possible that a person can perform a certain job. In this way, elements of chance are eliminated by the progressive accumulation of evidence tied to job performance.

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

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

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

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



Source: Open University (1988:72)

### 2.3.3 Job Analysis and Staffing Needs

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

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

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

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

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

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

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

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

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

#### **2.3.3.1 Curriculum and management requirements**

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

(b) Management tasks

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

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

(c) Management structure

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

**2.3.3.2 Forecasting student enrolment**

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

(a) Changing demographics

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

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

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

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

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

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

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

Source: Department of Education (1996:12)

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

- class size; and
- educator's workload.

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

(b) School choice options

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

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

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

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

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

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

### 2.3.4 Tenure for Professional Personnel

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

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

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

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

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

#### **2.3.4.1 The tenure process**

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

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

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

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

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

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

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

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

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

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

#### **2.3.4.2 Methods of obtaining tenure**

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

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

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

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

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

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

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

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

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

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

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

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

### **2.3.5 Redeployment and Retention of Teachers**

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

#### **2.3.5.1 Macro-external factors**

##### **(a) Macro-economic policy**

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

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

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

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

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

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

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

(b) Globalisation

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

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

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

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

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

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

(c) Human resource development

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

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

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

Verwoerd went further to declare that:

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

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

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

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

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

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

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

(d) Curriculum changes

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

(e) Changing values

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

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

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

(f) Education policies

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

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

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

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

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

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

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

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

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

#### **2.3.5.2 *Micro-organisational constraints***

##### **(a) Management-related factors**

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

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

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

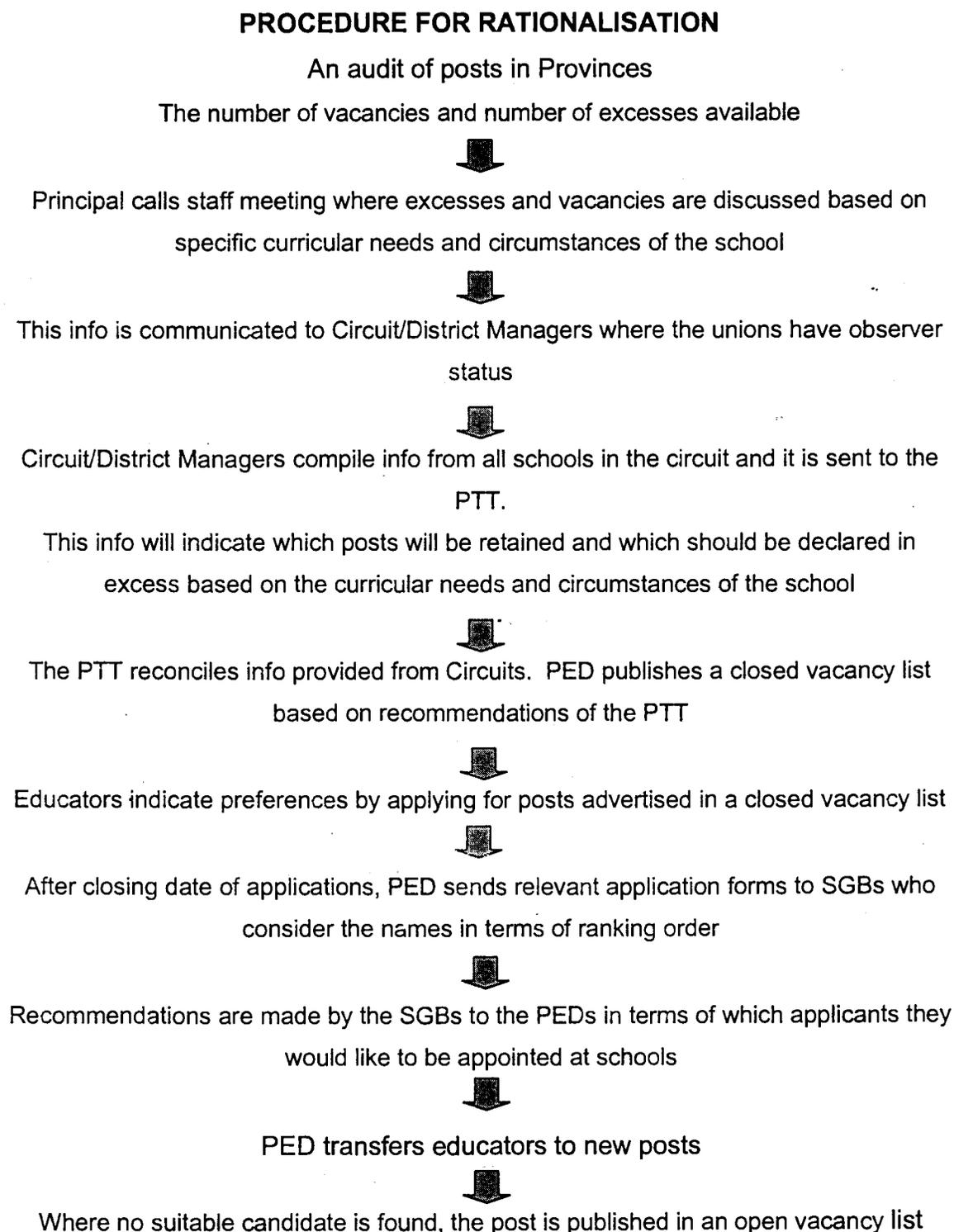
- Mutual trust and respect,
- Shared decision-making,
- Shared goals and values,
- Common vision,
- Open communication,
- Good teamwork,
- Promotion of the interests of the partnership rather than those of the individual, and
- Respect for the roles of different partners.

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

(b) Bureaucratic Constraints

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

**Figure 2.4: Procedure for rationalisation**



Source: SADTU, 1999:2

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

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

(b) Schools and the Bill of Rights

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

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

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

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

(c) Group dynamics

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

### 2.3.5.3 *Redeployment and Retention processes*

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

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

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

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

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

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

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

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

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

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

**Table 2.8: Weightings from the post-provisioning model**

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



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

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

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

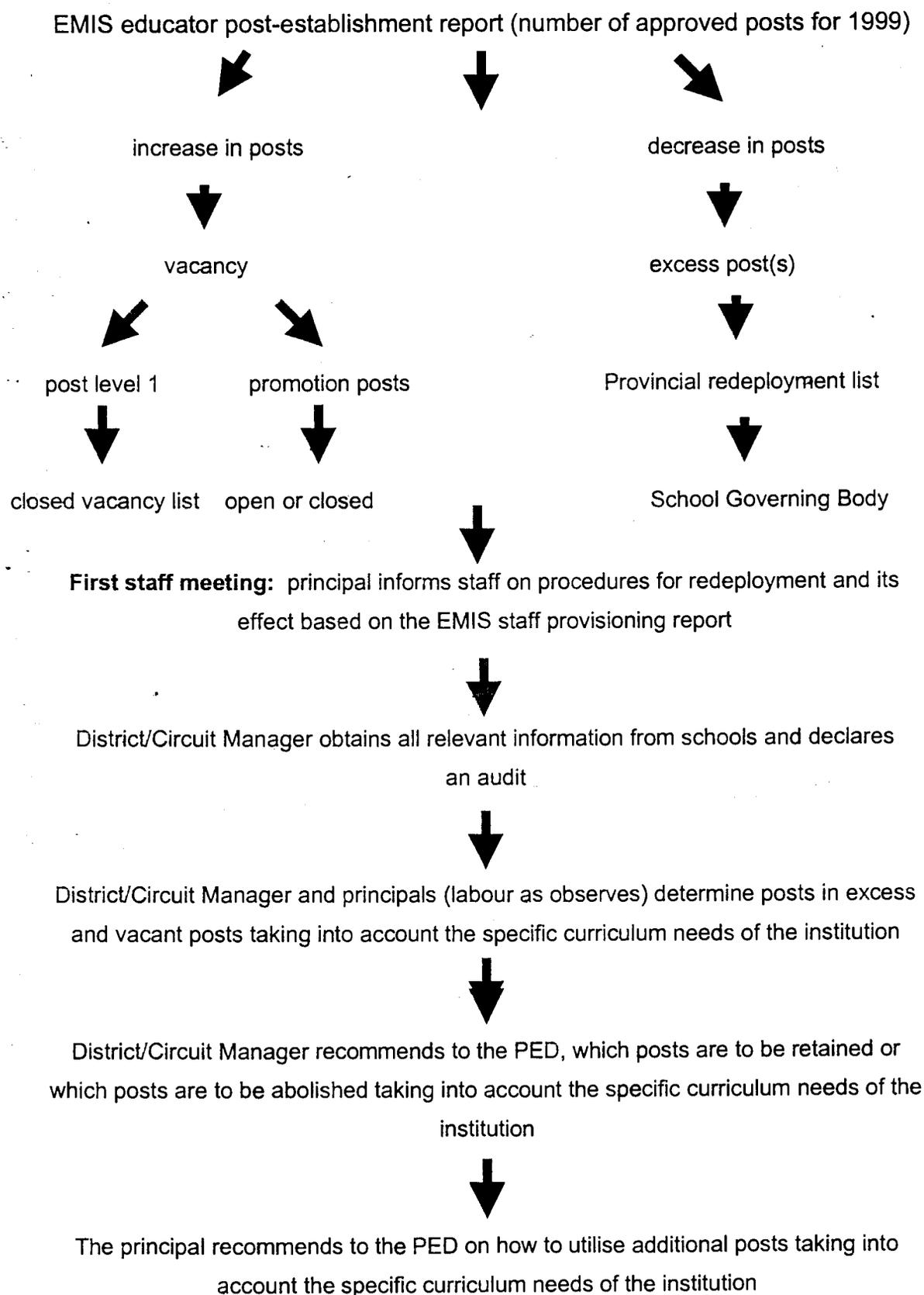
Furthermore, this process consider schools with more than one language medium of instruction. In order to provide for the additional demands of an additional language of instruction the number of weighted learners in each grade is increased by 15% of the number of learners who are being taught in another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

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

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

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

**Figure 2.5: Identifying Posts In Excess**



(a) Curriculum needs

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

(b) LIFO Principle

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

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

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

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

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

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



## Figure 2.6: Flow Chart C: Identifying Educators In Excess

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District/Circuit Manager and school principals determine educators in excess



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



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

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



The Department informs excess educators in writing



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

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



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

**Source: SADTU (1999:3)**

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

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

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

**Figure 2.7: Redeployment of Educators**

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



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

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



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



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

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



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

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



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



Department of Education makes appointment in terms of EEA, 1998



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



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

**Source: SADTU (1999:3)**

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

### **2.3.6 Teacher Attrition**

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

#### **2.3.6.1 *Reasons associated with Attrition***

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

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

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

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

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

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

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

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

## 2.4 REWARDING AND VALUING

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

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

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

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

#### **2.4.1 Attraction of Qualified Teachers**

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

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

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

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

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

#### **2.4.2 Retention of Excellent Teachers**

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

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

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

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

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

### **2.4.3 Current Forms Of Incentives In Schools**

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

#### **2.4.3.1 Motivational Factors**

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

#### **2.4.3.2 Incentives applied in Schools**

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

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

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

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

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

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

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

### **2.4.3.3 Variables affecting rewards**

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

#### **(a) Performance**

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

#### **(b) Effort**

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

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

(c) Seniority

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

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

(d) Skills

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

(e) Job requirements

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

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

#### 2.4.4 Incentives in the private sector

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

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

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

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

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

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

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

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

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

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

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

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

## 2.4.5 Career Paths and Recognition of Competence

### 2.4.5.1 *The teachers career*

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

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

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

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

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

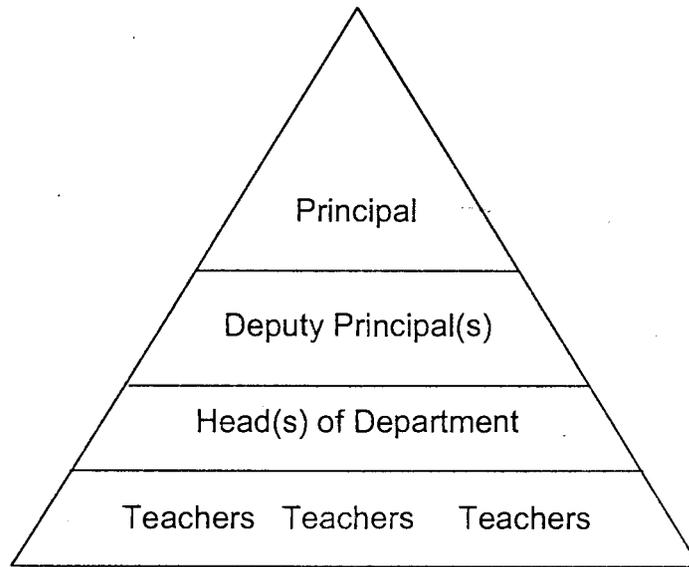
#### **2.4.5.2 Career path model for the retention of teachers**

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

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

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

**Figure 2.8 : Hierarchical Structure of Compensation**



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

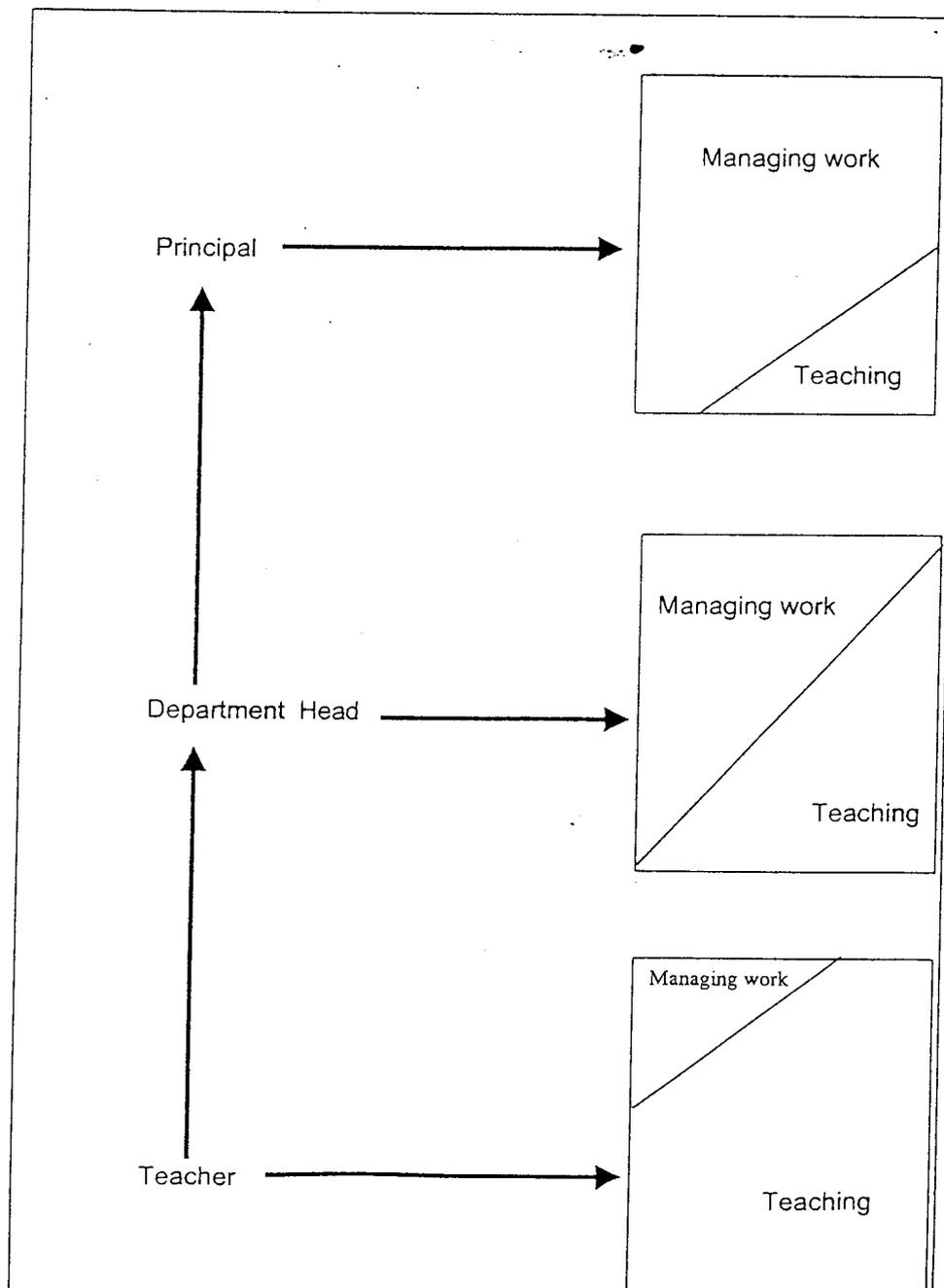
"Managing work and operating work differ with regard to nature, structure, aim, content and context. The fact that there is a semantic relationship between the planning aspect in management and the planning aspect in operating work, does not make the two planning aspects the same or equal functions as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

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

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

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

**Figure 2.9: Managing work and teaching work in the school**



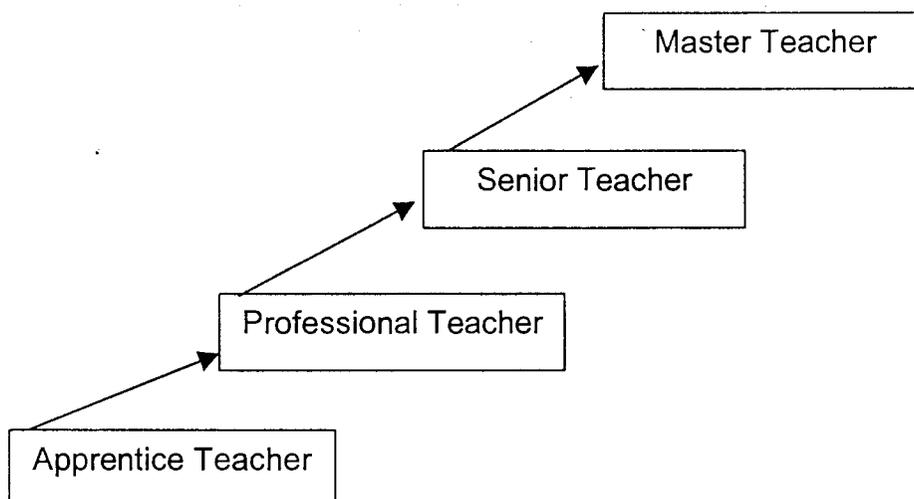
Source: Van der Westhuizen (1991:51)

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

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

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

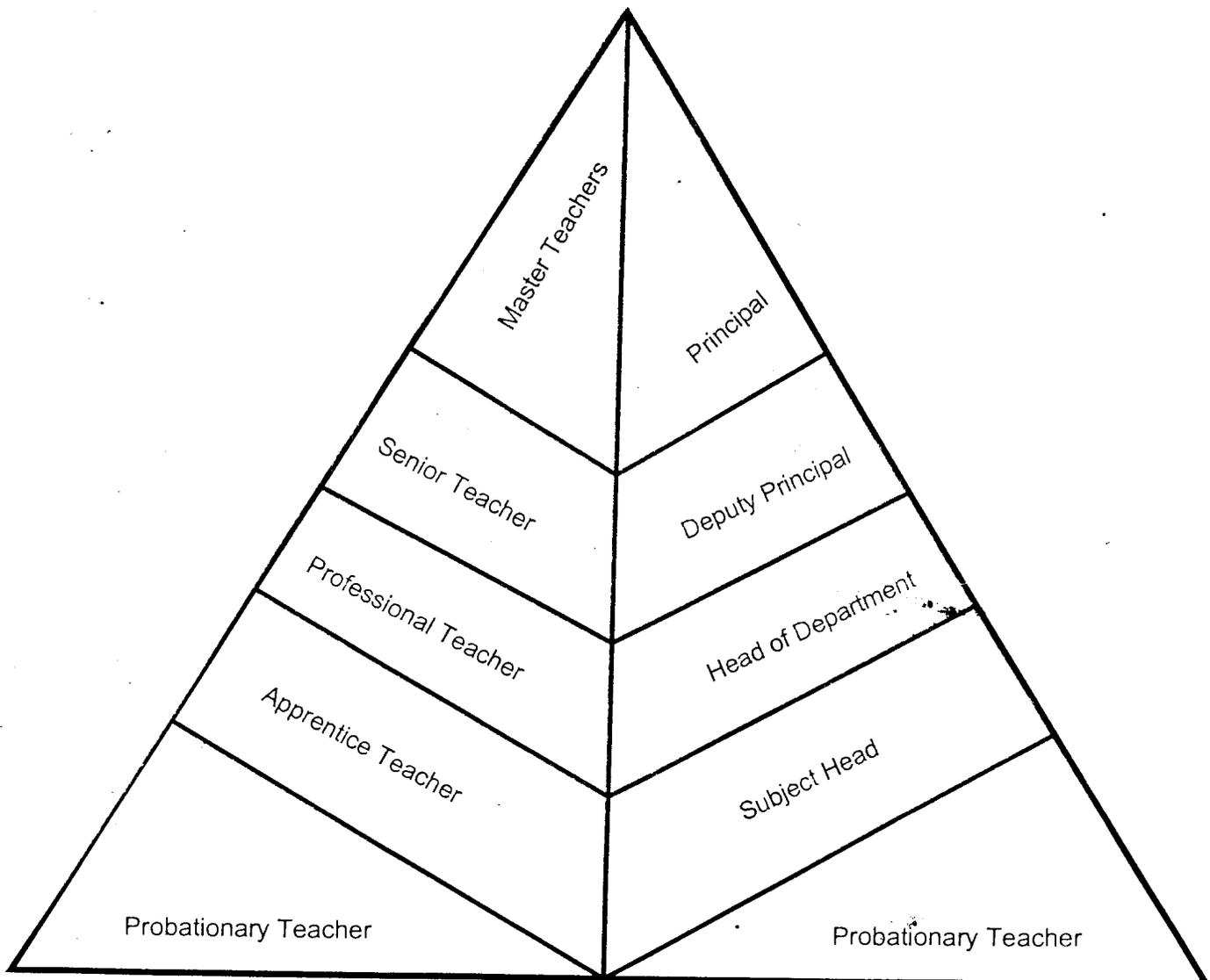
Figure 2.10: Career Paths for Teachers



Source: Maile (1998:198)

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

Figure 2.11: Dual Career Ladder



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

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

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

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

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

#### **2.4.5.3 Performance-related-pay**

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

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

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

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

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

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

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

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

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

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

Possible advantages are:

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

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

Possible disadvantages are:

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

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

## **2.5 PERTINENT ISSUES IN THE RECOGNITION OF COMPETENCE**

### **2.5.5 Recognition of Competence and the Disadvantaged**

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

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

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

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

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

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

### **2.5.5.3 Anti-male bias recognition**

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

#### **(a) Baggage from historical myths and cultural expectations**

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

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

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

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

(b) Discrimination

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

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

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

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

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

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

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

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

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

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

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

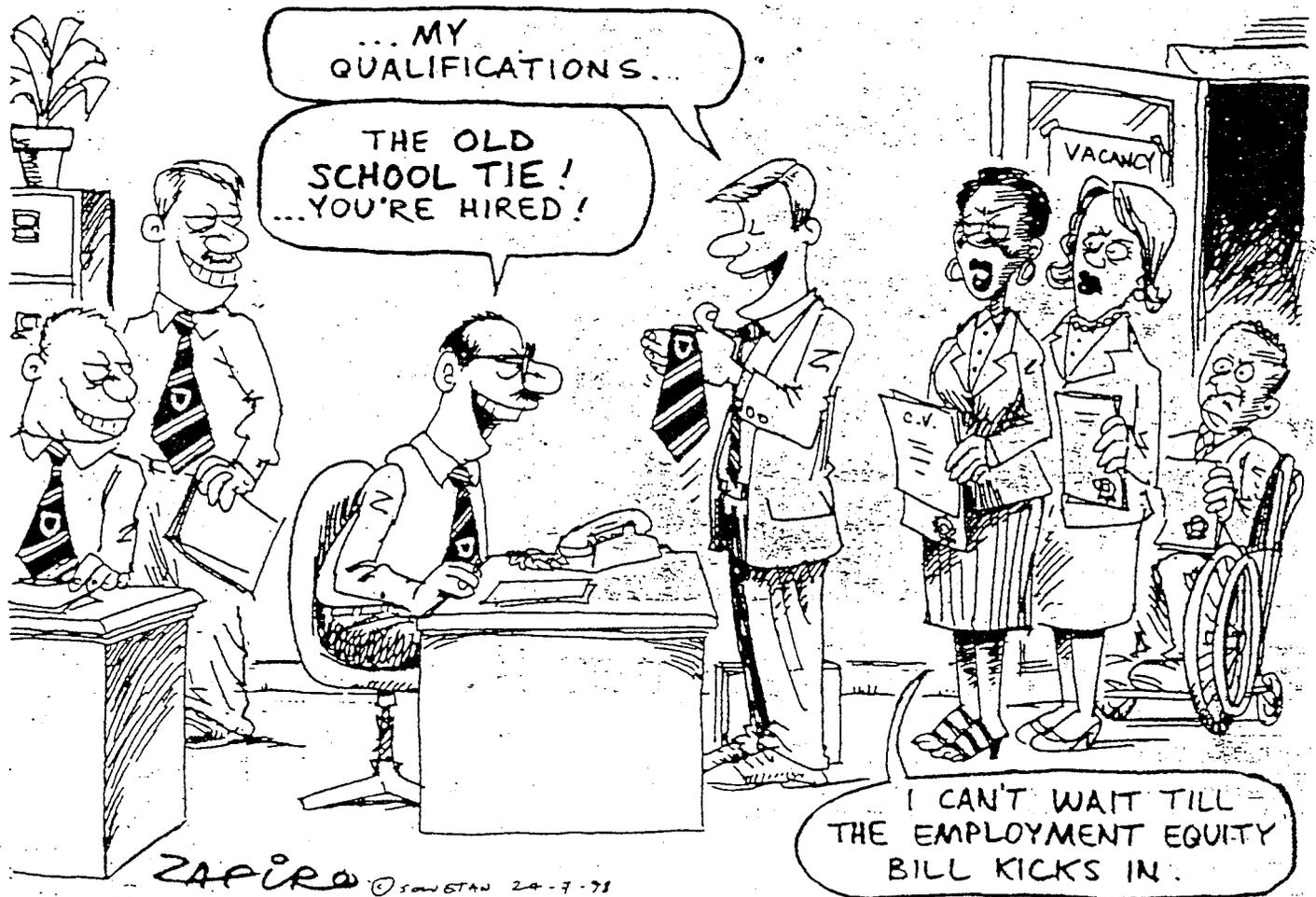
"As a women is by nature so much fitted for handling children, and as the great majority of Bantu children are to be found in lower classes of primary schools, it follows that there should be far more female than male teachers. The department will therefore ... declare the assistant posts in ... primary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

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

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

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

Figure 2.12: Discrimination in Recruitment and Selection



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

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

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

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

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

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

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

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

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

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

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

#### **2.5.5.4 Recognition of competence for the disabled**

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

(a) Employment of the disadvantaged

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

(b) Human resources management remedies

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

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

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

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

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

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

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

(c) Considerations for managing the marginal teacher

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

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

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

## 2.5.6 Organisational Management and Recognition of Competence

### 2.5.2.1 *The work satisfaction of teachers*

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

#### (a) Motivation theories

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

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

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

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

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

(b) Motivational factors

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

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

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

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

(c) Implications of motivation on educational managers

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

(d) Motivation as modification of behaviour

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

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

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

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

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

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

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

### **2.5.2.2      *Management as a potential source of demotivation***

#### **(a)      Management styles**

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

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

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

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

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

(b) Group dynamics

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

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

(c) Change

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

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

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

#### **2.5.2.3 Career success**

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

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

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

#### **2.5.2.4      *Teacher unrest***

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

(a)      School conditions characterised by

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

(b)      Service conditions impounded by

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

(c) Salaries described in terms of

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

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

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

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

## 2.6 CONCLUSION

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

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

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

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

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

## CHAPTER THREE

### 3. EMPOWERMENT AND CAPACITY BUILDING AS A MEANS TO RETAIN TEACHERS IN THE CLASSROOM

#### 3.1 INTRODUCTION

The current emphasis on competencies might be seen as creating a technology of management and leadership as well as teaching with the balance of opinion moving towards specific components of the role which can be defined, assessed or measured. There is no doubt that managers need knowledge (or access to knowledge) and a range of skills in order to be effective (or remain in the classroom). When contextualising this emphasis on technical competency, it becomes evident that technology translates into personal values, self-awareness, emotional and moral capability. This is to argue that teaching requires technical competency (Davies & Ellison, 1997:141). In terms of Marais in Garbers (1996:83) the technology of teaching denotes the application of knowledge for practical purposes through particular methods and approaches to develop and provide commodities for the convenience of society. A crucial fact emerging from this supposition is that teaching technology should satisfy the needs of the society in keeping with (economic) market forces.

Therefore, teaching would entail a kind of philosophical withdrawal from traditional perspective into a fresh perspective which is skills-based or competency-based. As such there is a need for better or quality teachers. This calls for ways to unleash creativity and innovation to enable individuals to make a full and effective contribution in schools (Morgan in Riches & Morgan, 1989:32). There are basic questions which can be asked as to how do we organise our institutions to face change? How do we harness individual innovation and creativity into broad needs of the organisation? How can managers make innovation the lifeblood of their organisations, and how to promote the ability to learn and change on a continuous basis? Answers to these questions points to different factors the total sum of which is empowerment. The imperative of empowerment addresses several issues such as harnessing parental

contributions for effective public schooling, creating and developing high performance teams, utilising staff development and performance management.

These programmes should be translated into action. Proper implementation of the above programmes depends on the ability of persons involved to correctly carry out assigned tasks with efficiency. This reiterates the need for technical competency which implies the need for specific skills, aptitudes and knowledge. Where technical knowledge is lacking capacity building programmes should be introduced. It is thus, the brief of this project to outline the relevancy of empowerment and capacity building in the retention of teachers in the classroom. The purpose of this chapter is to identify objectives and assumptions to empowerment, to describe the logic of empowerment, aspects and programmes that are associated with empowerment. Furthermore, the researcher shall probe the imperative of capacity building. Issues that comes to the fore in the investigation includes the legacy of apartheid, objectives, programmes and approaches to capacity building. The ultimate aim will be to outline not only the relevancy of empowerment and capacity building to the retention of teachers, but also the impact of both imperatives on improvement of quality education, and finally establish how empowerment and capacity building are complementary to recognition of competence.

## **3.2 EMPOWERMENT**

### **3.2.1 Aims and perspectives of empowerment**

The notion of empowerment, as it was defined in Chapter 1, is founded on enablement and transfer of power and control – which is essentially the prime aim of empowerment in education. These aims are not diametrically divorced from each other. Hence Jack (1995:1) is of the opinion that empowerment aims at authorisation, licensing or make able a process whereby someone uses his or her power to enable someone to do something; what that something is – its nature, goals and extent is controlled by the enabler. Thus the process of enablement is circumscribed by the power of the enabler and does not involve giving power over that process to the enabled.

In contrast, empowerment can be described as the process by which individuals, groups and/or the entire workforce become able to take control of their circumstances and achieve their own goals, thereby being able to work towards maximising the quality of their output. Here the emphasis is on power being transferred, devaluated, decentralised and delegated (Maile, 1998:80) to support teachers' commitment to quality classroom practice. The process of empowerment should be equated to lifelong process of personal and professional development. Ultimately, the aim of empowerment is to rekindle the love of learning and the love of teaching; to ignite the process of teachers becoming learners and our learners bringing their own knowledge and experiences actively into the classroom and the school. This is part of rebuilding the culture of teaching and learning (Davidoff & Lazarus, 1997:XVI).

Empowerment is a process which has no end. Teachers don't stop learning to become good (and excellent) teachers once they have received their initial training. This is possible when teachers have control of resources at school and have the ability to mediate the flow of resources (Richmond & McCroskey, 1992:2). It means that teachers should have authority and influence in the way schools are managed. According to Jacobson & Conway (1990:61) the notion of giving power to teachers is derived from:

- (i) The psychological factor – whereby power is derived from the kind of self-respect that comes from being respected and from being a competent and effective person;
- (ii) The social-political factor – which embodies holding office as a teacher, from the nature of one's relations with others as they are shaped by that office, from awareness of the socio-political environment and thinking critically about it; and
- (iii) The instrumental factor – whereby power is derived from one's capacity to extend a positive influence from self to the larger context of other individuals, one's institution and the entire education system.

In consideration of these dispositions, it is necessary to address the fear of school managers who feel threatened when power and influence are transferred to teachers. The perception created is that they (school managers) no longer have power – which is wrong in terms of the perspectives purported in empowerment. This view is held by Kotter (1979:5) who posits that:

"Ambivalent attitudes toward power, together with the lack of useful information about power and management, breed both naïve and cynical beliefs about what effective and successful managers do".

These beliefs can be very costly in both career problems and organisational problems. For instance, people who are successful early in their management careers sometimes fail to continue to grow into positions of greater management responsibility because of a lack of appreciation for, or skill at, power-oriented behaviour. Therefore, it is crucial to note that the argument is not that skills on power are all that is necessary for success in management, nor that power is always good when given to teachers. The point to be driven home is that to what extent is a manager able to perceive teacher's power as the extension of his or hers? To answer this question there is a need to reassure the school manager that his or her power to control and manage empowered teachers is borne out of:

- (i) Charisma – when teachers believe that the manager's special characteristics qualify him or her to lead and act on their behalf;
- (ii) Tradition – when people have respect for customs and patterns of behaviour, and grant authority to those who symbolise these traditions and values; and
- (iii) The rule of law – when people believe the proper exercise of power is a function of adherence to procedure and the following of rules (Richmond & McCroskey, 1992:4).

The presence of one or more of these conditions is found teachers grant social approval necessary to stabilise power relations. That is, they recognise that someone has the right to rule and they consider it their duty to obey. Thus, the school manager, whose power is manifested in the following ways

- power of reward;
- power of force;
- lawful power;
- power of reference;
- power of competence; and
- expert power (Van der Westhuizen, 1991:172; Richmond & McCroskey, 1992:5).

is able to perform managerial functions at the peak. And his or her performance and influence is a reality as a result of

- (i) compliance – when teachers follow him or her;
- (ii) identification – when the principal's behaviour resonates with the 'feel' of the institution; and
- (iii) internalisation – when one accepts influence because the induced behaviour is consistent with her or his value system.

Thus, such power is actualised through the modes of persuasion and inducement, and is founded on resources available, technical skills, a body of knowledge, legal prerogatives and access. The conclusion that can be drawn from this debate is that empowerment is a complex process which requires collective efforts at understanding its aims and perspectives. Empowerment of teachers is perceived to have value in restoring the culture of teaching and learning. Hence more resources must be invested in it. In this way, the aim of empowerment can be defined as having individual and social benefits (Claassen, 1995, in Botha, 1998:65). The individual teacher benefits of empowerment can be discerned through the development of the teacher's personality, his or her critical insight and by providing a person with appropriate skills from which he or she can perform at his or her peak and earn a living.

Social educational benefits are varied. Drucker in Riches & Morgan (1989:25) summarise them as the need for better educators who are businesslike, results-oriented, effective and efficient. And it is in the interest of the economy that teachers are empowered. In the same vein, Bock (1994:78) posits that empowerment

..... is called upon to alleviate poverty, to serve as the vanguard in directing social and economic change, and as the means of individual improvement. Particularly in new nations that are attempting to merge diverse and often competing ethnic and tribal groups into a unified nation, empowerment is charged with providing the young with competencies required for productive participation in the modernising economy; with mobilising previously parochial populations to purposiveness; and with reforming the inequities of distribution by levelling the presently affluent and highly educated while elevating the powerless.

From this quotations it can be deduced that empowerment, with the aim of allocating social benefits, has to do with education as a social agency, cultural mediator and constitutive activity (Mehan, 1992:1). Empowerment in education as a social agency aims at stabilising relations between home and school. As a cultural mediator it entails that education aims at creation of harmonious relation between different cultural groups so that groups should learn to co-exist. And finally as a constitutive activity it means that schools should be characterised by a vibrant life whereby their (schools) processes and practices respond to competing demands that often unwittingly contribute to inequality.

Empowerment makes it possible for teachers to exercise power and have more control over their professional lives. That means having a greater voice in institutions, agencies and situations which affect them. It also means being able to share power or exercise power over someone else, as well as them exercising it over you. As such, empowerment designates partnership or involvement. In this project, empowerment is unfolded in programmes which develop from a particular paradigm and perspectives which underlie the empowerment logic. It is evident that empowerment is central to teacher support, education, training and development (Mda in Pretorius & Lemmer, 1998:78). Furthermore, empowerment is critical to the country's response to globalisation (Claasen in

Pretorius & Lemmer, 1998:119). Classrooms are not islands. Teachers cannot simply teach what and how they like, oblivious to outside influences. What happens outside the classroom strongly influences what happens inside the classroom. This is described by Saddler in Dekker & Van Schalkwyk (1989:307) as follows:

"The things outside the school matter more than the things inside the school".

Outside influence is enormous in education, and brought changes on traditional education. Changes brought by globalisation include:

- Curriculum changes;
- Introduction of multiculturalism;
- Technological education; and
- The changing face of the workplace.

The aims and perspectives outlined above are rooted on the following assumptions of empowerment.

- (i) Organisations use only a fraction of the mental resources represented in their people.
- (ii) Control is not the only or the best way to achieve organisational goals and it is an impossible way to achieve superior performance and continuous improvement.
- (iii) Individuals grow better in teams, partnerships and networks.
- (iv) Individuals and teams will perform more effectively and efficiently when they are given the chance to exercise maximum control over their work.
- (v) Competence is not the private preserve of a few experts. Competence is widely diffused in an organisation at all levels.
- (vi) People have greater personal ownership and demonstrate greater responsibility for that over which they have influence and which they experience 'as theirs' (Kinlaw 1995:2-3).

Finally, it can be concluded that empowerment is carried out so that more work can be accomplished. Everyone and every team exert competent influence to some degree. Thus, empowerment harnesses the already existing process to help organisations to compete and survive. This is possible because competent influence is developed and deployed in areas where it is critically needed. It involves the distribution of power to individuals or groups. New competencies are unlocked and applied across the entire range of tasks and processes. Empowerment is a direct response to transformation. It makes change more meaningful because change processes are undertaken proactively by those directly involved.

### **3.2.2 Objectives**

The aims of empowerment outlined above are general statements that designate the intention of educational managers. In the section the general statements are clearly reflected in the following objectives:

- (i) To define and describe change in terms of transformation;
- (ii) To analyse the paradigm shift that impact on education;
- (iii) To describe programmes that help define competent influence in organisations; and
- (iv) To present mental dispositions that describe the model of empowerment for the retention of excellent teachers.

These objectives are explicitly discernible in concepts such as teacher involvement, collaboration, joint-decision making, increased teacher autonomy and professionalism, participative management, development programmes, lifelong learning, devolution of power, site-based management, self-managing schools, etc. These concepts will be used very often in the ensuing discussion.

### 3.2.3 The empowerment logic

#### 3.2.3.1 *Paradigm shift*

Managers in schools are faced with the challenge of operating in a rapidly changing world. In this world the globalisation in education systems has increased expectations that society has of its education system. Past uncertainties are replaced with new frameworks. Dynamic change has become the order of the day (Davies & Ellison, 1997:11). Therefore, the question is how do managers meet this challenge? How do they respond to economic expectations on education, society anticipation of technological advances and their appreciation to them. Answers to this questions invokes questions such as:

- what is a paradigm and a paradigm shift?
- why are paradigm shifts important?
- what are the barriers to new paradigms?
- What is the relationship between paradigm and change?
- are there any paradigm changes in education?

#### (a) Definition

The term paradigm has become increasingly popular among contemporary researchers in South Africa. Consequently, several writers have attempted to present a scientific exposition of the term paradigm. Among them, Kuhn in Arjun (1998:viii) defines paradigms as

"universally recognised scientific achievements that for a time provide model problems and solutions to a community of practitioners".

Arjun (1998:21) conceptualises paradigms as

"a philosophical scheme of thought or a theoretical formulation on a subject which relates to the set of concepts, categories, relationships, values and methods which are generally accepted by a community of practitioners at any given period of time".

The Department of Education, RSA (1997:6), after grappling with the need to effect changes in the education system so that it moves in the same pace and rhythm with the broader transformation, defines a paradigm as:

- a shared set of assumptions.
- a framework of thought.
- a game with a set of rules.
- a basic way of perceiving, thinking and doing – associates with a particular vision of reality.
- a set of rules and regulations that first define boundaries and tell you what to do to be successful within those boundaries.

The problem with this latter definitions is that they tend to adopt a loose usage of the term paradigm whereby almost anything began to be called a paradigm. This is accounted by usage of terms such as assumptions, game, perception, laws or rules. A paradigm cannot be everything or about everything. It has the following characteristics:

- It is constituted by the constellation of beliefs, values and techniques shared by members of a scientific community.
- It reflects our most basic beliefs and assumptions about the human condition (Arjun, 1998:21).

Therefore, a paradigm cannot be a game. Schools cannot be managed through games, although games are an aspect of education. Perhaps it is essential to distinguish between paradigms to unravel where games can fit as a paradigm. Basically there are two main types of paradigms:

- the dominant paradigm, in which researchers work from an orthodox ideological position, determining the identity of a discipline; and
- the emergent paradigm, which is established by non-orthodox researchers and which succeeds the dominant paradigm in a tradition shattering scientific revolution (Arjun, 1998:21).

Furthermore, there is a need to identify and distinguish the scope of paradigms.

The following is the scope of paradigms:

- Macro-paradigms: are worldviews. That is, they are applied globally by the scientific community.
- Meso-paradigms: Is an overarching frame of reference shared by the scientific community.
- Micro-paradigms: Are used when detailed solutions are required on a parochial scale (Arjun, 1998:21).

A paradigm shift refers to a move from one paradigm to another; from one way of looking at something to a new way. It means a move to a new mindset, a new attitude, a new way of thinking; a change to a new game with a new set of rules – when the rules change then part of our world changes (Department of Education, 1997:6).

(b) Why are paradigm shifts important?

Paradigm shifts are important because most significant changes are driven by a shift in paradigm. In our education system this shift is inevitable because there is a need for learning on global awareness; on helping the learner to recognise their responsibilities; and on opening up access while ensuring that people have access to quality (Department of Education, 1997:7).

(c) Barriers to new paradigms

Changing to a new paradigm would mean setting a new vision and adopting new approaches, models, theories, dispositions, hypothesis, basic assumptions and axioms. This would constitute a drift away from common practices. Consequently, a new way of thinking and doing things is critically needed, lest the benefits of the new paradigm may elude us. However, people tend to be comfortable with what they know and develop fears for the new and unknown (Department of Education, 1997:7). As such, there are a number of reasons which would be negative towards new paradigms. Sentiments such as —that's impossible, its radical, its not realistic, we've tried something like that before and it didn't work – are common.

In addition to these, the main reason why new paradigms are rejected is the psychological barrier. Anxiety becomes common. People are sceptic of their ability to succeed. Some would have fear of losing their power. People are peeved when their expertise are made irrelevant. These barriers are confirmed by Machiavelli (1552) in Day, Whitaker & Wren (1987:44) who says that:

"It must be considered that there is nothing more difficult to carry out, nothing more doubtful of success, nothing more dangerous to handle, than to institute a new order of things. For the reformer has enemies in all those who profit by the old order".

The anxiety mentioned above comes when people fear to be out-competed by their adversaries who may have laws in their favour. Some are incredulous to the new order and do not truly believe in anything new until they have actual experience of it.

(d) Relationship between paradigm and change

Change is initiated as a result of a shift to a new paradigm. When a new set of assumptions, basic beliefs, fundamental values, techniques, etc are accepted by scientific community, a new way of doing things emerge. Thus, paradigms guide people's actions and decisions. They provide a new focus, conceptual framework or way of seeing the world. As a result of a new way of seeing things being adopted, change is introduced. Therefore, change is based on a new set of assumptions, theories, hypotheses, axioms, laws and constellation of beliefs, values and techniques.

(e) New paradigm in education

A shift from a paradigm characterised by discrimination and inequalities of the past to a new paradigm is not only a necessity in ensuring that the education resonates with the broader transformation of the South African Society, but also epitomises the task of education managers in moving forward with changes despite the hindrances conspicuous. The rationale for moving to a new paradigm includes:

- Changing theories of language; learning and cognition.
- Recognition of prior experiential learning.
- Recognition of the achievements of learners with specialised educational needs.
- Transparency of the empowerment process and support of learning through agreed performance or assessment criteria.
- Acknowledgement of competence at every level.
- Flexible credit accumulation allowing portability and progression (Department of Education, 1996:30-31).

Central to a shift to a new paradigm in education is curriculum development initiatives. Curriculum policies are developed and changed in specific circumstances involving political and economic considerations. The curriculum of the former dispensation has been regarded as irrelevant and producing distorted

labour force. Coupled with the transverse challenges of globalisation it means that the knowledge and skills of teachers has to be massively upgraded.

The changes in the curriculum are guided by certain paradigms. The essential features of the new curriculum are outcomes-based learning, a model which focuses more on learning, acquisition of competencies and a contextualised curriculum (Arjun, 1998:24). Most of the details of the new curriculum have been dealt with in Chapter 2 of this project.

### **3.2.3.2 Empowerment and capacity building**

There is a mutual relationship between empowerment and capacity building. Although the details of each concept are dealt with separately, we need to remember that one can seldom separate any element from another as they are intertwined in so many ways. It is therefore difficult to talk about any one element without referring to the other. So, while the separation of these elements in this discussion is done for the purposes of analysis, their interdependent nature must be kept in mind at all times. In particular, the dynamic relationship between development of individual educators and the reconstruction and development of institutions is a thread which runs through the entire analysis.

Empowerment and capacity building arise as a result of transformation, which involves every aspect of South African life. Major steps are being taken to transform the economy so as to promote growth with equity and justice. In each sphere there is a need to change, not simply the scale of provision and access to services, but the very nature of those services and the way they are conceptualised, resourced and delivered. Therefore, the task of transformation is greater than reconstructing the systems and structures which sustain any society. It requires a fundamental shift in attitudes, in the way people relate to each other and their environment, and in the way resources are deployed to achieve the society's goals (Department of Education, 1996:11). Thus, empowerment and capacity building are a means used to address the imperatives for change in education.

Education and educational institutions are empowered and capacitated in order to play a meaningful role in the transformation agenda. Both empowerment and capacity building have proportionate effect as catalyst for school improvement (Fullan, 1997:21). The search for "quality school", "school effectiveness", and school improvement invokes empowerment and capacity building whereby performance of educators, the institution and the system at large is placed under scrutiny with the purpose of establishing conditions of schooling, ethics and standards of the profession and reviewal of outcomes (Smith, 1997:137-139).

Empowerment and capacity building are employed to enable individual educators and institutions to meet challenges they face in their everyday practice, and to cope with changes that underpin the current initiatives at teacher development.

### **3.2.4 Empowerment programmes**

#### **3.2.4.1 *Site-based management (SBM)***

Developments in school autonomy has received little promotion and support from educational managers. As such, very little research was done in this aspect. Perhaps one can say that at the moment what is needed is a framework to examine whether any fundamental reengineering changes in school decision making practice have taken place. This section examines what is meant by site-based management or self-managing schools highlighted in the Department of Education (1997)'s National Norms and Standards for School Funding in terms OF The South African Schools Act, 1996. This document represent a shift in paradigm from a paradigm of centralised management of schools to a decentralised one whereby schools retain autonomous status.

(a) Definition

The concept of site-based management has been developed from corporate experience whereby schools are equated to small business which is autonomous to other business, responsible for its own financial system (Davies & Anderson, 1992:07). There are different, yet implying the same thing, terms used for SBM such as delegated school management, Local Management of Schools, school-based management, school-site management, autonomous schools, self-managing schools, etc.

(b) Background

Currently the South African education system is centralised. The Department of Education maintains control of large administrative and professional structures – which control and manage education policy, budget and operations. This means that schools are mainly responsible for curriculum implementation and classroom learning and teaching.

However, with the promulgation of the South African Schools Act, 1996 the pendulum is swinging towards decentralisation where decision-making powers are transferred at the ground where educational activities take place (Department of Education, 1998:1). This is what I referred to earlier as a shift in a paradigm of centralisation to the one which is largely decentralised. This often called self-managing schools (SMS) or site based management (SBM).

(c) SMS or SBM and change

SMS or SBM is a process which epitomises the broader changes taking place in the society. This process invokes fundamental changes which include:

- representation of a shift of decision-making power towards decentralisation;
- alteration of the governance of education;
- identification of the school as the primary unit of educational change; and
- and a move towards increased decision-making power to the local school.

(d) The essence of SBM

The essence of SBM is that:

- Educational problems are attributable more to the failure of the system of schooling than to the shortcomings of individual educators;
- Empowerment is a more effective tool than prescription;
- Bottom-up, school based solution strategies will lead to more satisfying results than will top-down mandated ones; and
- It changes the entire system of district and school organisation and restructures more roles in the district and head office (Department of Education, 1995:1).

(e) The rationale for SBM

Education is a shared responsibility. It means that all stakeholders must be accorded a certain measure of power in order to make the machinery of education moving. According to Potgieter et al (1997:9) schools are given power to manage themselves because "the State cannot do everything for the school". Parents, learners, teachers and other stakeholders cannot expect the State to give everything and do everything for the school. It is the responsibility of all stakeholders to see what the school really needs and what the problems in the school are. The other logic is that schools operate in different contexts, and thus, have different needs and unique problems. In this way, SBM allows local managers to address their local and unique needs and wants without restraints from the central managers.

The issue of SBM as a means to share responsibility is endorsed by the South African Schools Act, 1996 which accord the school governing bodies (SGBs) governance and management of schools. The SGBs are given powers to formulate and adopt policies which enable schools to function according to local circumstances but consistent with the Constitution of 1996. It is believed that if management of day-to-day education activities becomes the prerogative of local managers, school effectiveness will be increased (Van Wyk, 1998:21).

(f) Prerequisites for the effective SBM

- (i) Consideration of teacher's view and perception of the proposed change;
- (ii) Consensus on the objective of change;
- (iii) Taking individual differences into account;
- (iv) Sensitivity to past differences affecting change;
- (v) Careful implementation of change;
- (vi) Expecting resistance to change;
- (vii) Preventing misunderstanding when new ideas are introduced;
- (viii) Awareness of differences which may lead to conflict and resistance;
- (ix) Considering timing and time scheduling;
- (x) Mutual trust between the principal, parents, staff and other stakeholders;  
and
- (xi) Following a specific strategy and framework (McLennan, 1997:49-50).

(g) SBM framework

Generally, the framework for site-based management revolves around governance and management. These are interwoven elements in the transformation that is aimed enabling schools to provide effective and efficient education. Governance is widely concerned with the formulation and adoption of policy; whereas management deals with actual day-to-day running of the school (Van Wyk, 1998:21). It will be simplistic and naïve to conclude that the framework is governance and management. There is a need to delineate the policy responsibilities of the principals. It means that there must be a structural framework indicating powers and limitations of the SGBs and the principals.

However, under normal circumstances and according to the provisions of the South African Schools Act, 1996 the SGB retains all powers currently held in relation to the educational policies of the school, including budgeting and school development planning. Structures can be created within the ambit of the SGB to plan and monitor

- Resources;
- Management;
- Curriculum;
- Educational environment; and
- Accountability (Department of Education, 1998:8).

On the other hand, the principal of the school, as the operational leader must assume responsibility for the implementation of the school policy and development plan. This would require of the principal to create working committees that would include teachers, parents, and learners in case of Further Education and Training (FET) institutions. These committees will include:

- School Finance Committee;
- Curriculum Committee;
- Student Welfare Committee;
- Supplies and Services Committee; and
- Professional Development Committee (Department of Education, 1998:2).

In order to forestall conflicts at schools, it is necessary that structures with interest in education be represented in these structures. However, this is not a precondition. Ultimately, SBM will have powers over

- Budgeting and expenditure;
- Finance;
- Administration;
- Personnel;
- Curriculum; and
- Parental involvement.

In conclusion, it can be mentioned that institutional autonomy is a precondition for empowerment and developing excellence in education. The rationale behind it is that better quality will be obtained when decisions are made by those who have to deliver the services and who, from a professional point of view, know best how

to respond in the most efficient way to the clients' demands. The reasons for a move to SBM are varied. However, it is crucial that when local authorities are given powers to determine their own policies, goals, standards, objectives and targets, they must focus on critical areas such as

- enrolment, attendance and retention;
- student achievement;
- school facilities;
- student discipline and health; and
- redress and equity issues (Shaeffer, 1997:223).

And finally, SBM must, if it is to survive and contribute to quality education, address questions such as: Whom do we teach? What do we teach? How do we teach? How much is it going to cost? (Baily, 1991:1). Otherwise the challenges of the twenty-first century may overwhelm us.

#### **3.2.4.2 Empowering partnerships**

##### **(a) Nature and definition**

Partnership is taken from the business whereby a number of people, who have a common goal, co-operate with one another by contributing something of value (for example, money, skills, etc) to a relationship with the aim of making a profit (Potgieter, et al, 1997:8). Simply put, partnership involves two or more individuals working collaboratively toward a desired outcome (Sujansky, 1991:3).

In education management the motive of profit in partnership is understood to be quality education for all. Therefore, partnership should be characterised by a collaborative, collegial mode of working together resulting in a win-win situation whereby the primary objective will be the transfer of power and decision-making to subjects so that they retain authority and autonomy in their sphere of operation (Maxcy, 1991:146). Power in this regard refers to the capability or potential to effect change. Research findings (Richmond & McCroskey, 1992:83) reveal that despite the notion of teachers being accorded power in their sphere of operation,

teachers still remain impotent as they use their capacity in affinity-seeking rather than exerting their power. Hence the entire culture of learning and teaching has deteriorated.

To overcome this problem, there is a need for partners to share common vision and mission, create a flexible working environment in which authority is shared, each person is challenged to do his or her best and earnest commitment to quality (Sujansky, 1991:3). Partnerships create a supportive organisational environment that benefits everyone. Such an environment ensures that all people, regardless of their levels in the organisation, have the following experiences:

- Understanding how their work fits into the big picture and being challenged to make significant contributions;
- Believing in the organisation and in its desire to produce the best services;
- Feeling recognised for their talents, experience and contributions;
- Knowing that making mistakes is part of the process of growing and innovating (empowerment);
- Seeing that success is celebrated and that rewards are given to those who earn them;
- Accepting workforce diversity as an advantage to the business; and
- Knowing that the quality of each employee's work life is to those who earn them;
- Accepting workforce diversity as an advantage to the business; and
- Knowing that the quality of each employee's work life is important to the organisation (Sujansky, 1991:5-6).

An empowering organisation should develop a climate that recognises, nurtures, and encourages the effort of partnering.

(b) Underlying assumptions

When beginning any collaborative effort, it is useful to develop a list of assumptions to guide management empowerment activities. The following assumptions are useful:

- People are kind and want to do the right thing.
- People are very busy and often under a lot of pressure. If you provide them with some warm, human understanding and can show how working with you will make life easier for them, they will probably be more inclined to work with you.
- Establishing a co-operative working relationship is a process.
- Turf issues come with the territory and should be expected.
- The individual with whom you are trying to work has knowledge and expertise and should be respected (Steffy & Lindle, 1994:40-41).

When clear underlying assumptions are established, partners are more productive and are able to withstand the inevitable conflicts that surface over time.

(c) Areas of partnership

While it is important to note that partnerships can be developed at any level of the organisation and any situation in the organisation, the following areas of partnership are selected for their relevancy and importance to recognition of competence and empowerment:

- Teachers and their colleagues (Teams)
- Teachers and parents (Parental involvement)
- Teachers and the business
- Teachers and managers
- Teachers and educational institutions
- Teachers and consultants.

When partnerships are established in these areas the organisation will have a mine wealth of skills, expertise and even resources to draw from. Everyone will have a monolith of power to draw strength and grow professionally. What follows will be a discussion of each area of partnership.

(i) Teachers and managers

A partnership between managers and teachers is a primordial upon which empowerment is unfolded in organisations. The manager-teacher partnership originates from the powers the managers have (which were discussed in section 3.2.1 of this project), and the leadership style of the manager. It means that, with regard to the latter, collaborative, collegial, democratic and participatory leadership styles are the ones that will feature predominantly in empowering teachers. Since the concept manager is embracive and mean a lot of things, in this instance it refers to the school manager (the principal).

Legislation and policy provisions imposes rights and responsibilities on both parties. The duties and responsibilities of teachers include:

- promotion of the intellectual and personal development of learners;
- promotion of a culture of learning and teaching;
- fostering in learners a culture of human rights;
- acting in a just and impartial manner in their dealings with learners; and
- taking the appropriate measures to attain and maintain a high level of professionalism (Van Wyk, 1998:27).

In the same vein, Nxesi (1998:6) is of the opinion that teachers enter into partnerships with managers because of the following reasons:

- Search for the most effective and appropriate methods of teaching and learning.
- Search for new, progressive and innovative methods of assessing student performance.

- Provide guidance to all students without prejudice in the face of the difficult and emotional trials of youth.
- Refer students with specific learning, emotional or socio-economic problems to professionals in the field.
- Develop students' sense of self-discipline and responsibility so that they can become active, independent and responsible members of the society.
- Facilitate communication with other stakeholders on progresses and developments made in education.
- Participate in broad policy formulation, and curriculum planning and evaluation.
- Participate in decision-making structures.

These reasons also apply to teachers' partnership with other stakeholders, and help in defining the teachers' role in the partnership. In that way, a clash of roles will be averted. It is crucial to note that the other precondition for this partnership is a democratic culture (Maxcy, 1991:157) whereby the manager is open and fair, consistent and focused, flexible and firm in ensuring that the partnership is goal focused, communication adequate, optimally equalises power, cohesive and innovative (Sergiovanni & Starrat, 1993:84).

Likewise, the duties and responsibilities of school managers must include:

- Ensuring that educational services provided in the school are of a high quality.
- Carrying out management activities (planning, leading, organising and control) with regard to educational activities at school, professional administration and policy implementation.
- Promoting the culture of teaching and learning at the school.
- Promoting a high standard of professionalism and management at the school (Van Wyk, 1998:27).

The essence of manager-teacher partnership lies in investment in the teachers the right to participate in the determination of school goals and policies and the right to exercise professional judgement about the content of the curriculum and means of instruction. This assumes that empowerment is fundamentally a value-based activity, and as such, it requires that teachers have expertise to engage in thoughtful deliberations and professional authority to participate in decisions taken about their schools and classrooms (Blasé & Blasé, 1994:4).

In this way, the principal will accord teachers dignity and will help them to be more fully responsible for work-related decisions.

Teacher empowerment is founded on democratic principles of seeking mandate through consultation, shared decision-making and participatory management. In the same vein, the manager(principal)-teachers partnership represents a shift in paradigm from a paradigm whereby schooling was characterised by a long and nefarious legacy of autocratic control. In the past teachers were not generally seen by managers as active agents who should be encouraged to innovate and seek to bring about change. Thus, consultation was regarded as a necessary evil (Van den Berg in De Wee, 1994:11).

The shift to a new paradigm of democratic management of schools entails that

"No longer can the principal make decisions in a vacuum. There must be input from all stakeholders the decisions will affect" (Shortt, 1994:45).

As such, this shift is "one of tapping teachers' expertise and experience to facilitate enlightened decisions and build better educational programmes" (Blasé & Blasé, 1994:5). And finally, it must be considered that teachers are indispensable resource that have expertise and skills that form a professional basis for helping solve organisational problems.

(ii) Teachers and their colleagues

No teacher can remain an island in his or her professional life in the wake of proliferation in scientific discoveries, technological advancements and globalisation. Consequently, there is a need to establish teams or groups. The formation of teams help to create a new frame of reference, make joint decisions on policy issues that affect classroom practice, mobilise resources for the transformation process and increase a high level of professionalism (Whitaker, 1997:112).

The isolation among teachers should be destroyed if empowerment is to be a reality. Squelch & Lemmer (1994:70) find that "teachers spend most of their time in the classroom with their pupils. They are accustomed to working next to one another in separate classrooms but are not used to working in teams. Teachers often feel threatened by the thought of sharing ideas (or failures) and co-operating professionally". This kind of attitude is major drawback in the restoration of the culture of learning and teaching. In contemporary times an individual is no longer regarded as the primary source of change, innovation and seat of expertise. Today teamwork is highly valued, not only for its benefits to teachers but also for its enhancement of quality education.

The serious challenge facing managers is to see to it that effective teams are established to overcome isolationist attitudes among teachers, and doing away with unilateral power tendencies in themselves that restrain consensual management, participative management, joint-decision making, collaboration and co-operation. This is necessary because of "an increasing disdain for authority", and "misuse of power inherent in positions of authority", and "resistance to authority has become pervasive" (Wynn & Guditus, 1984:3). This attitude emerge when people are meeting as unequals.

Therefore, authority should be built upon subordination. People must be willing to accept subordinate roles. There is a need to move from competition to co-operation (Steffy & Lindle, 1994:19) on the side of teachers. And management team members who find themselves by 'stamping' their authority within the group

(Wynn & Guditus, 1984:3). In this way a team will be a team not a group of individuals. Teams should be characterised by a high degree of unity and commitment to common vision and mission. In terms of McEwan (1997:35) teams experience unity when team members share:

- a willingness to put group goals above personal goals;
- a feeling of confidence and support on the part of group members for each other;
- understanding of what the team's mission is;
- the ability to handle conflict, decision making and day-to-day interaction;
- enthusiasm about involvement; and
- equally the resources and recognition.

**Table 3.1: Roles of team members**

<b>CONTRIBUTOR</b>		<b>COLLABORATOR</b>	
Positive Traits	Negative Traits	Positive Traits	Negative Traits
<ul style="list-style-type: none"> <li>• dependable</li> <li>• efficient</li> <li>• logical</li> <li>• pragmatic</li> <li>• systematic</li> </ul>	<ul style="list-style-type: none"> <li>• compulsive</li> <li>• perfectionistic</li> <li>• uncreative</li> <li>• data-bound</li> </ul>	<ul style="list-style-type: none"> <li>• co-operative</li> <li>• conceptual</li> <li>• visionary</li> <li>• flexible</li> <li>• imaginative</li> </ul>	<ul style="list-style-type: none"> <li>• over committed</li> <li>• insensitive</li> <li>• over involved</li> <li>• too global</li> </ul>
<b>COMMUNICATOR</b>		<b>CHALLENGER</b>	
Positive Traits	Negative Traits	Positive Traits	Negative Traits
<ul style="list-style-type: none"> <li>• supportive</li> <li>• encouraging</li> <li>• relaxed</li> <li>• helpful</li> <li>• considerate</li> <li>• patient</li> </ul>	<ul style="list-style-type: none"> <li>• aimless</li> <li>• foolish</li> <li>• placating</li> <li>• manipulative</li> </ul>	<ul style="list-style-type: none"> <li>• candid</li> <li>• ethical</li> <li>• outspoken</li> <li>• adventurous</li> <li>• principled</li> </ul>	<ul style="list-style-type: none"> <li>• rigid</li> <li>• arrogant</li> <li>• self-righteous</li> <li>• contentious</li> <li>• nit-picking</li> </ul>

Source: McEwan (1997:36)

This table leads us to another technical requirement of empowering teams, and that is roles of team members. The roles identified are:

- Contributor
- Collaborator
- Communicator
- Challenger

Roles of team members are not limited to the above. Other roles include:

- isolator – one who just sits in and do not participate;
- facilitator – one who makes sure everyone gets a chance to talk;
- dominator – one who speaks too often and for too long;
- harmoniser – one who keeps tension down;
- free-rider – one who fails to do his or her share of work;
- detractor – one who constantly criticises and complains;
- digressor – one who diverts the discussion;
- air head – one who is never prepared for group meetings; and
- socialiser – one who is a member of the group for social and personal reasons. (Squelch & Lemmer, 1994:79).

What must be established is that while roles may be given to members by the group leader, some members may use their roles for negative things or may assume negative roles to the detriment of the group. Consequently the team will not gel and good time is wasted. To circumvent this, there is a need for identification of roles such as a specialist who will meticulously observe activities of the team in conjunction with the implementer, co-ordinator and shaper. (Everard & Morris, 1990:175).

When a team works collaborately, the members develop an identity of its own. It is this identity that enables the team to work through the inevitable differences in opinion that occur over time. If the team is able to establish answers that everyone can agree on, there is a greater likelihood that the team will establish



good working relationships among members. Therefore, it is crucial to consider the four stages of team growth such as:

- forming – whereby members grapple with mechanism of working together;
- storming – the difficulty of the task ahead begins to become more fully understood;
- norming – team members reach maturity and develop a strong sense of collegiality, common identity and common spirit; and
- performing – the team takes action to deal directly with their goal or purpose (Steffy & Lindle, 1994:43-48).

Teachers are empowered as collectives who interact with one another. The advantages and benefits of such collectives are wide ranging and include:

- sharing information;
- accessing resources, special talents and strengths;
- creating supportive environment;
- better quality decisions are arrived at;
- rekindle teachers' morale in caring for each other; and
- joint effort in restoring the culture of teaching and learning (Squelch & Lemmer, 1994:71).

### (iii) Teachers and parents

One of the reasons why the culture of teaching has declined is because there is a gap between teachers and parents. Teachers do not have knowledge of the child's home background (which can be furnished by parents), on the one hand. On the other hand, parents tended to stand far away from schools and watch. Consequently, a huge problem on what is taught and how is education taught arose. Learners became uninterested in education and teaching was relegated to mere 'depositing' whereas learning became regurgitation of what has be deposited (Maile, 1998:12; Lethoko, 1999:32).

This problem can be tracked down from the circumstances prevailing in the past whereby parents were reluctant to become involved in the education system they considered illegitimate and alien to them. However, current legislation (White Paper on Education and Training, 1995 and South African Schools Act, 1996) ushered in a new era whereby teacher(s) – parent partnership is not only a necessity in the restoration of the culture of teaching and learning but also an imperative in empowering teachers. The aspects of such empowerment includes:

- monitoring school attendance of learners;
- payment of school fees so that more resources can be made available to the school (Van Wyk, 1998:30-31); and
- providing additional skills (professional parents invited to contribute seminars, workshops, etc.).

The strength of teacher(s)-parents partnership is based on areas such as:

- Communication – whereby school problems can be communicated to the entire organisation through relationships with parents.
- Mutual assistance – manifested in teachers helping parents on problems of their children with their professional knowledge, and parents helping teachers on the social background of their learners.
- Learning at home – helping parents with strategies that will enhance the learner's performance in homework. Parents are enabled to supervise learners' homeworks while teachers' problem of learners not writing homeworks will be minimised.
- Decision-making – most decisions on school activities do not materialise because parents are not involved. Involvement of parents in decision-making increases legitimacy and mandate.

Evaluation of this partnership reveals the following advantages (Van Wyk, 1998:32-33):

➤ Advantages for students are:

- Students' academic achievements improve.
- Students' experience increased self-esteem and decreased behavioural problems.
- Improved attitude to school.
- Increased commitment to school work.

➤ Advantages for parents are:

- Feel more positive about the abilities to help their children.
- Greater understanding of teachers and their problems.

➤ Advantages for teachers and schools are:

- Decreasing teachers' workload.
- Teachers understanding of children in their care increases.
- Teachers feel more positive about their work.
- More resources are made available to the school.

(iv) Teachers and the business

- The introduction of an integrated approach to education and training, in the White Paper on Education and Training, 1995, represents a partnership between teachers and the business which reflects a rigid division between academic and applied learning, theory and practice, knowledge and skills, and head and hand. The integrated approach is closely linked to the National Qualifications Framework which is based on a system of giving credit for learning outcomes achieved by the learner, both in and out of formal education sector (Van Wyk, 1998:33).

What is entailed in the above paragraph is that teachers who had qualifications from outside of teaching are now given recognition. The new system makes it possible to credit learners' achievements at every level, whatever learning pathway they may have followed, and at whatever rate they may have acquired the necessary competence (Department of Education, 1996:30). The new system also provides for the recognition of prior experiential learning. This comes at the crucial time when the need for excellent teachers is based on qualifications. It means that underqualified teachers with at least REQV of 10-12 and with teaching experience spanning 10 uninterrupted years (ELRC, 1997:6) are awarded credit for unit standards which they are able to meet registered outcomes for those unit standard.

Thus, the partnership between teachers and business consolidate the former's place in the education system. Thus, this represents a move away from the traditional concept which involved spending a specified period of time in an institution. It will benefit teachers who can demonstrate through agreed procedures that the knowledge, expertise and skills that they have acquired in churches, Adult Basic Education and Training (ABET) centres, industrial training institutions, vocational training institutions, etc. meet the required learning outcomes. Such credits count towards a given qualification if they are relevant to that qualification (Malan, 1997:7-8).

The teacher's partnership with business is crucial in addressing the backlogs in education. Given the fact that "the State cannot do everything for the school" (Potgieter et al, 1997:9), this partnership will benefit the education system in general. The umbilical cord between teachers and business naturally emanates from the school's expectation for the business to supply, jobs to graduates while business is dependent on education to supply literate and learned workforce with specific expertise, skills and attitudes. Thus, education and industry are mutually dependent (Van Wyk, 1998:34), and both equally benefit from such a partnership.

Opportunities which will benefit learners include:

- visit industrial sites – to gain valuable insight into the exact requirements of a particular job and understand how academic work relates to the demands of the working world as well as being motivated by coming into contact with their role models;
- use industrial resources much needed in poorly resourced schools; and
- explore opportunities for career advancement, counselling and development (Van Wyk, 1998:34).

Benefits for teachers are:

- being invited to attend company training courses;
- attending further training courses with industrial contributions;
- having access to the use of technology not available in the school;
- being able to make use of expert assistance from business for policy making, resource allocation and plannings;
- receiving up-to-date information about the needs of the workplace that will enable educational institutions to develop their programmes; and
- making use of experts from business and industry as part-time advisers or teachers and trainers in the school (Van Wyk, 1998:34).

Further benefits for teachers and education in general include having the opportunity to gain first-hand experience and knowledge of a variety of careers. The teacher's counselling skills are enhanced with that diverse knowledge. The school's curriculum can be developed according to labour market forces, and the same applies to individual lessons. In that way, business will benefit from well-prepared labour and reap the benefits of high-production labour force.

(v) Teachers and educational institutions

The task of management, at all levels in the education system, is ultimately the creation and support of conditions under which teachers and their students are able to achieve learning. This becomes a reality when management commit themselves to development, education and training of teachers. Teachers can be empowered through partnerships with excellent teachers in other schools. What is crucial with regard to empowerment is that teachers must continue to teach within the available standards. It means that there is a need to consider the limitations of teachers. This is called sustainable development.

Sustainable development refers to meeting the needs of the present situation without compromising high standards and quality needs of the future to meet the present needs (Winberg, Douglas, Van Heerden, Van Heusden & Pointer, 1997:57). In other words, managers must ensure that the present standards and quality of teaching have to be managed in such a way that the future generation of teachers will continue to build on, and develop the education system to greater heights. Beside supplying educational resources, teachers' self-esteem must be enhanced. This refers to the teacher's identity, dignity or respect. An essential element of empowerment is the development of the teacher's self-esteem so that he or she value him- or herself and recognise his or her skills, expertise and attitudes.

In that regard partnership with tertiary institutions is essential if empowerment is to be a reality. Schools, together with tertiary institutions, can tackle educational problems that plaques education and maximise opportunities for growth. Therefore, it is important to look at the structural aspects of this partnership. Firstly, there is a need to identify tertiary educational institutions that are potential partners. They include:

- Teacher Education Colleges
- Technikons
- Universities

- Non-Governmental Organisations which offer short courses and tertiary qualification.

Although school-tertiary institution partnership has a certain uniqueness with regard to empowerment of teachers, a few specific considerations are worth to be noted. Technically, this partnership can be barred by geographic separateness with the wherewithal constraining on school-university relationships. Another barrier identified by the National Teacher Education Audit (1995) is that preservice teacher education (PRESET) and inservice teacher education (INSET) are not linked in a continuum of professional development (Hofmeyr, 1997:47). There is a notion of teacher quality which is equated with qualifications (often irrelevant) and rewarded with an automatic salary increase. Further anomalies to address include:

- The teacher education is fragmented, with tertiary institutions (Higher Education) operating largely in isolation from one another.
- Most institutions adopt distance education model without student support. As a result, good teacher education is rapidly being driven out of existence by poor teacher education as more institutions turn to correspondence education.
- The problem is exacerbated by this institutions who are inclined to measure their quality in terms of how many students (teachers) pass, rather than the standard of their courses and examinations.
- The professional mission of many teacher education institutions is being subverted by the presence of large numbers of students who have no desire to teach but want an affordable route to a higher education qualification. Once they obtain their qualifications, these students abandon the profession.
- The quality of education is uneven in all sectors of providers. There is a huge disparity across higher education institutions with the Historical White Institutions (HWI) staffed with highly qualified academics and well resourced, while Historically Black Institutions (HBI) are laced with underqualified staff and are under resourced (Naidu, 1999:6).

However, experiences in Canada (the Quebec Learning Consortium in Lennoxville; Learning Community Partnerships McGill University in Montreal; McGill University – School board agreements on teacher education; Advisory Committee on Teacher Education – McGill University in Montreal; the Centre for Educational Leadership – McGill University in Montreal, etc.) clearly demonstrate the practicality and possibility of school-university partnership. Therefore, the lessons learned from these partnerships are that:

- A climate for change is the context for effective partnerships.
- Managing the relationship is the key to effective partnerships.
- Shared values are the soul of effective partnerships and networks.
- Systemic change is the goal of an effective school-university partnership.
- A new paradigm of professionalism is the foundation of an effective school-university partnership.
- A bias for action is the strategy of an effective school-university partnership.
- Membership privileges are the benefits of an effective school-university partnership (Keyserling, Baker & Peter, 1997:235).

Today's trends in education appear to be moving away from isolationism to collaboration where individuals are empowered through partnerships. Like any human creation, partnerships have problems. However, the benefits of partnership are more than the disadvantages. Therefore, where problems persist outside help may be sought. This leads us to a partnership with consultants.

(vi) Teachers and the consultant(s)

Consultancy is a helping relationship provided by people or a person who have a particular range of skills for helping managers and teachers in schools to understand more clearly what their business is about and how it might become more effective (Gray, 1988:7). Consultants convey a range of affective matters such as skills, competencies, attitudes, values, understanding and creative insights. Consultancy can be equated to the task of subject specialist who offer guidance, remedial and counselling services to schools (Dekker, 1994:3).

Teachers' partnerships with consultants is characterised by development and empowerment activities which adopt the following approaches:

- Consultative assistance – which brings technical skills to a problem situation, but does not change the expertise of organisational members, nor affect the inter-personal relations among them.
- Content consultation – which aims at educating members in a substantive area and seeks to bring out individual changes in understanding, attitude or skill, but does not focus on the organisation.
- Process consultation – which focuses on such organisational phenomena as communication patterns, planning, decision making and interpersonal relationships (Gray, 1988:180-181).

The role of consultants is important in schools to tackle technical challenges imposed on teaching by technological advancement, curriculum developments, globalisation and transformation issues. Because schools are fraught with challenges and problems, the support of consultants is necessary to provide expertise and skills to enable teachers to meet those challenges and problems head-on. Therefore, teachers may draw 'power' from internal and external consultants to stand firm and develop their current practices. The problems which teachers face cannot be dealt with effectively unless an 'objective outsider' is invited to the school. Thompson (1984) in Day et al (1987:74) concur with this idea when saying that:

"If one is on one's own, one will only see what one is ready to see; one will only learn what is on the edge of the consciousness of what one already knows".

Partnerships with consultants is based on the following aims (Day et al, 1987:74):

- To review classroom events and their context.
- To audit the education process.
- To inculcate reflective skills in teachers.
- To provide reflexive resources to be used by teachers from time to time.
- To share expertise with teachers in their self-development.

- To provide feedback in enhancing teacher's professionalism.

Internal consultants at school are identified as inspectors, subject advisors and specialist teachers – which include heads of department, subject heads or any specialised skill. Internal consultancy is relevant and seem to be well accepted by teachers who:

"argue that if a consultant cannot tell them what to do in their classrooms to solve their immediate problems, then he or she should not be working in schools" (Letiche, et al, 1991:109)".

What teachers need is relevant and direct expertise and skill not generalisations and inferences about their problems. Therefore internal consultants will provide hand-on solutions and quick fixes.

Another option to explore is the use of the services of external consultants. External consultants are a rare resource in education. However, they may be identified as field-workers, experts in non-governmental organisations (NGOs), and intellectuals in colleges, technikons and universities (lecturers, doctors and professors). As 'objective outsiders', consultants are impartial, fair and frank because they are not involved in organisational politics of the school (Letiche, Van der Walt & Plooy, 1991:110). Hopkins (1986) in Day, et al, (1987:74) finds that teachers prefer outsiders because asking help from a peer might be regarded as a sign of weakness and interpreted as self-indictment; it reduces competition (which often leads to rivalry) and comparison, and the impartial ideas of external experts can be of credit to the new user.

An evaluation of partnerships between teachers and consultants reveal advantages and disadvantages (Day, et al, 1987:75). The advantages for teachers and the organisation at large include:

- Enables the teacher to carry on with his duties while a remedy is searched.
- Reports from consultants are not biased and are more objective.
- Can offer a wider comparison of experiences gained somewhere.

- Can move freely and see the children working in different situations.
- Can focus on a specific problem without being obstructed by internal conflicts.
- Can provide post-lesson critical dialogues.
- Can be used to check against biased self-reporting, and to assist in more lengthy processes of self-evaluation.

Disadvantages are:

- Unless a regular visit is made their interpretations may be out of context.
- Children may not be open with an outsider.
- Teachers, if not assured of confidentiality, may not be open to consultants.
- Observers will have their own biases and over-generalisation.
- It is time consuming – observer and teacher must spend time together before and after the work observed to negotiate and fulfil the contract.
- Resources may limit the consultation.
- It is hard to find consultants, especially in education.

**Table 3.2: Advantages and Disadvantages of:**

INTERNAL CONSULTANTS	
ADVANTAGES	DISADVANTAGES
Understand the organisation's politics, budget constraints, and goals.	May have a biased approach or a limited range of experiences to bring to the partnership.
Are already working in the environment and know the policies and procedures.	May already have a preconceived notion of what works and what does not work.
Are committed to the organisation and its strategic plan.	May be too threatened or influenced by top management, the manager, or their own managers to be objective.
Usually cost less than external consultants.	May be involved in other projects and unable to make a full-time commitment.
EXTERNAL CONSULTANTS	
ADVANTAGES	DISADVANTAGES
Can bring a fresh approach and varying experiences to the partnership.	May not know the environment, politics, budget constraints, goals, policies, procedures, or organisational background and may need to be given such information.
Have no preconceived notions about what works within the environment.	Are committed to the organisation and its goals only from the standpoint of committing to the project and providing a service.
Are not threatened or influenced by members of the organisation.	May cost more than internal consultants.
Can concentrate their energies on the project.	May be available with only long-term notice

**Source:** Sujansky, (1991:86).

When teachers are partnering with consultants their skills, expertise and knowledge are enhanced. However, sometimes they may benefit and gain a better approach to their work. Consultants are change agents who analyse problems or opportunities and recommend courses of action. In this way the organisation (school) is improved through constructive change.

### **3.2.4.3 Joint-decision making**

According to the Gauteng Department of Education (1996:1) education management has been recognised as an important area of development. However, given the throes of transformation at school level, the establishment of democratic governance and implementation of a capacity programme is the priority of the department to enable schools to meet the transformation needs, build ethos of the organisation and development of leadership capacity, management competencies – more job specific and technical skills. Sustainable development is more realistic through participative decision-making. Joint or participative decision-making entails making decisions on needs from teachers, parents, students and other stakeholders.

The greatest challenge is how to exercise influence over others, affecting their perceptions, filling any vacuum and make them do something that they will otherwise not do? At least joint decision-making promise to meet the challenge as it provides decisions with more technical quality. That is to say decisions are taken by people who are involved with implementation (Kinlaw, 1995:61).

The paradox of this practice is that:

"If a decision by the cadre resulted in a major blunder, it would be the principal who would be held accountable, not the cadre. For this reason, some principals retained veto power over cadre decisions – in effect, reducing the cadre to an advisory committee. Other principals restricted the jurisdiction of the cadre to areas they considered safe, such as curriculum issues. This solution eased some anxieties, but in the process, these principals might have undermined shared decision-making". (Hess, 1992:80).

This problem emerges from the perception that management is "the task of the few" (Department of Education, 1996:27). Instead, management should be seen as an activity in which all members in the school are actively engaged. If collective responsibility is sought, then no individual will be blamed if anything go wrong. It is unlikely that blunders will be committed when decisions are made by people closest to the student (Shortt, 1994:40). With inputs from all the stakeholders it is impossible to make blunders. Therefore, it is important to tap



from teachers' expertise and experience to facilitate enlightened decisions and build better education programmes.

Perhaps a huge challenge is how to transform and develop management from the long and nefarious legacy of autocratic control – whereby the teachers are not seen by school managers as active agents who should be encouraged to innovate and seek to bring about change (Van den Berg in De Wee, 1994:11). What is needed is basically about having the ability to influence and to be influenced by individuals and groups to take them in a desired direction (Open University, 1988:14). No longer can principals make decisions alone and in a vacuum because:

"education is inherently a difficult and complex process and because circumstances are constantly changing, problems will inevitably arise in individual schools and classrooms. These problems are best diagnosed by the teachers most closely concerned because they know the students and the context sufficiently well" (Eruat (1985) in Hewton, 1988:6)".

Power should be utilised in decision-making to influence management outcomes such as (Department of Education, 1996:4).

- Capacity to deliver : to create an environment conducive to quality education; to organise, plan, co-ordinate, systematise and structure; to facilitate; guide, support and enable; and to provide effective leadership in achieving educational goals – in getting things done;
- Capacity to learn and reflect: to assess and monitor systems and processes, and to learn from that evaluation;
- Capacity to mobilise and use resources efficiently : to harness new resources while at the same time making best use of existing physical, financial and human resources, and to work in partnership in so doing;
- Capacity to innovate : to work effectively towards paradigm shifts; to organise the process of transformation and change.

Therefore, joint decision-making is an element which steers empowerment and capacity building. When reflecting on the above outcomes the following premises of decisions (Newton & Tarrant, 1992:96) become conspicuous:

- Organisational constraints;
- Assumptions;
- Conscious manipulations;
- Values and beliefs;
- Practices about 'who we are'; and
- How we do things 'round here'.

In the same spirit decision-making involves processes that are ground rules which guide decision-makers. These rules or principles directly answer questions such as:

- How should a decision be made and who should be involved?
- When will it be made?
- When should the decision be discussed?
- At what point on the agenda?

Answers to these questions are embodied in specific decision making techniques. Joint decision making starts with value development – which is founded on relationships with parents, teachers, learners, and other stakeholders. McEwan (1997:4) identifies three phases of value development :

- (i) Acceptance – the individual is willing to identify with the value, but can quickly reassess its worth if more desirable options present themselves.
- (ii) Preference – the individual is committed enough to the value to pursue it.
- (iii) Commitment – the individual has such a degree of certainty about it that he or she will always act upon it with firm conviction and certainty.

Values are motivational factors, serve as reference points for self-reflection, are standards to judge decisions of others, and triggers creativity among partners or in the team. The hallmark of joint decision making lies in creativity which offer practical ideas to get the job done (McEwan, 1997:65). The productivity of organisation is enhanced when critical information is shared, and depressors are avoided when members of the organisation reach consensus. The question of how is joint decision making is arrived at will be answered in Chapter 5. At least joint decision-making addresses the happiness of teachers. It ensures that teachers who are retained are those who are motivated to perform at their peak. Teachers who are retained require programmes that will enhance their skills, expertise and attitudes. And these competencies should be regularly developed to guarantee teachers a place in the classroom. This is the object of discussion in the topic below.

### **3.2.5 Empowerment models**

#### **3.2.5.1 Orientation**

In addition to the programmes outlined above, there are empowerment models which seek to address the problem of retention teachers in the classroom. Among them, the list include:

- Life-long learning;
- Professional and competence development;
- Human development; and
- Induction

The nitty-gritty of each model will be discussed below and guidelines as to how to implement the theories attached to this model will be provided in the next chapter.

### 3.2.5.2 *Lifelong learning*

#### (a) Why the commitment to lifelong learning

In order for educators to be guaranteed a place in the classroom they must commit themselves to continuous learning – which is often referred to as lifelong learning. Hence, Caldwell (1989:86) believes that

“Teachers should be learners. They should be continuously refining their skills”.

Likewise, Foks (1997:131) agrees that “one burst of education and training early in life will simply not be enough. Instead, this initial learning should be seen as part of a lifelong learning process where new knowledge, skills and attitudes are developed as acquired”. Individual educators should seek to rekindle their skills for various reasons, including the need for personal development, changing jobs and within society, and changing technologies. The call for educators to commit themselves to learning is emphasised by Rebore (1991:162) who states that:

“It is literally impossible for any individual to take on a job and remain in it for forty years with his/her skills basically unchanged”.

Furthermore, Steuteville-Brodinsky, et al, (1986:6) cautions educators that:

“old facts are dying, new facts are being discovered. Old concepts are becoming obsolete; new concepts are coming to the fore”.

In the same vein, Veldsman in HSRC (1997:5) alludes that:

Current jobs would no longer exist in their present form ... Sixty-six percent of the technology that would be in use by 2000 is not currently in use ... And that professional skills become obsolete after each year of graduation”.



The turbulence of change on education compels educators to stand on their toes and commit themselves to lifelong education. These unprecedented onslaught on teachers skills, knowledge and expertise poses a huge challenge on the quality of education. Therefore, the biggest challenge to educators is how to remain knowledgeable and continue serving in the classroom. The answer to this question lies in lifelong learning because the current-workplace is marked by change.

(b) Over-arching framework for lifelong learning

Lifelong learning is premised on the following overarching framework:

(i) Continuous learning marked by:

- a system for continuous renewal;
- inquiry;
- complex decision making;
- self-knowledge;
- courage to risk failure; and
- critical thinking

Reflective practice embodied in:

- disposition of keen sense of curiosity;
- high degree of intellectual honesty;
- reflection;
- systematic inquiry and judgement; and
- certainty of ability to solve problems.

(ii) Curiosity characterised by:

- inquiry; and
- risk taking.

(iii) Efficacy which includes:

- teacher certainty;
- links to innovation, risk and joint decision-making; and
- human interaction (Collinson, 1994:8-14).

(c) Implications for practice

The notion of lifelong learning involves the idea of educators assuming the roles of learners. This has implications to the management of lifelong learning process. The following are the implications:

- (i) Educators' needs must take a primacy, hence Licklider in Maile (1998:7) is of the view that traditional models of learning based on the "one-size-fits-all" theory did not succeed. Teachers' needs should not be ignored. Teachers must judge what the teacher is doing.
- (ii) The process of lifelong learning must capitalise on the teacher's strengths. It means that the teacher's skills, attitudes and knowledge should be refined according to current needs of the school. Hence Imenda (1995:178) is of the view that lifelong learning or continuous learning should not "subvert essential academic standards but rather contribute to the development of a learning environment which in turn genuinely facilitates the academic growth of talented students".
- (iii) Schools should become learning organisation which is manifested in personal habit of continually clarifying individual vision and aspirations to take charge of and responsibility for individual actions (personal mastery); allowing individuals in an organisation to examine their assumptions

critically and to expose their thinking to others so that they can influence or learn from it (mental models); generation of individual commitment and creation of a coherent increase in organisational effectiveness (building shared vision); allowing groups to discover understandings and accomplish goals which the individuals could not attain on their own (team learning); and systems thinking whereby an individual's contribution is viewed as part of the whole (Clark, 1996:115). Schools are learning organisations when:

- teachers continually expand their capacity to create the results they truly desire;
- new and expansive patterns of thinking are nurtured;
- collective aspirations are set free; and
- people are continually learning how to learn together.

(d) Advantages of lifelong learning

Lifelong learning exhibits the following advantages:

- (i) Invest in teachers' future through education and training.
- (ii) Create opportunities for and encourages all teachers to realise their potential and capabilities.
- (iii) Encourages contribution by all learners as they share common vision and mission.
- (iv) Integrate work and learning and inspire all to seek quality, excellence and continuous improvement in both.
- (v) Mobilise all their human talent by putting emphasis on education and training.
- (vi) Empowered all to broaden their horizons in harmony with their preferred learning styles.
- (vii) Enables teachers to learn and relearn constantly in order to remain innovative and invigorating.

- (viii) Respond proactively to the wider needs of the environment and society in which organisations operate and encourage teachers to do likewise (Van der Bank, 1997).
- (ix) Stimulates further renewal, self-knowledge and professional interaction (Collinson, 1994:14).

(e) In conclusion, one can say that lifelong learning remains the ideal to today's changing world of work and complex demands of teaching. Hence, even "if teacher colleges did a perfect job preparing teachers, if knowledge did not change, if technology remained the same, if students all learned the same way, teachers would still need to continually upgrade their skills" (French, 1997:38). Lifelong learning perceives teachers as "knowledge workers". (Duffy, 1997:78), whose needs and interaction are key to effective schools. It is for this reason that lifelong learning, as an empowerment model, is employed to facilitate innovation, reform and improvement of schooling.

### **3.2.5.3 Human development**

In terms of Steffy (1989:8) there is a need for empowerment to improve the whole teacher not only his or her skills, knowledge and expertise. What Steffy (1989) suggests is a paradigm shift in the way teachers are developed – from behaviourist orientation to human development for "it makes little sense to try to improve the technical skills of a teacher apart from the way a teacher feels about himself or herself". While it is necessary to look at the organisational life, consideration of the individual teacher's well-being is increasingly critical if human resources managers (HRM) intend turning their organisations into world class institutes (Pont, 1995:42).

The influence of psychology is centrifugal to this emerging paradigm. The human development model begins from the assumption that human learning is far too complex to be observable, measurable, terminal behaviour. Consequently it is necessary that when a teacher is underperforming, HRM should not only evaluate him or her on the technical aspects, but also on social factors that

impact on his or her performance. Table 3.3 gives a clear illustration of this model.

**Table 3.3: A comparison of the behaviourist and humanistic approaches**

	<b>Behaviourist or stimulus-response</b>	<b>Humanistic</b>
Nature of human beings	Human behaviour is shaped by environmental forces (reinforcement) and is a collection of learned responses to external stimuli. The key learning process is conditioning	The individual is unique, free, self-determining, Free will and self-actualisation make human beings distinct from animals. Present experience is as important as past experience
Nature of psychological Normality	Possession of an ad-equately large repertoire of adaptive responses	Ability to accept oneself, to realise one's potential, to achieve intimacy with others, to find meaning in life
Nature of psychological Development	None as such. No stages of development. Different behaviour is selectively reinforced at different ages, but the differences between the child and the adult are merely quantitative	Development of self-concept with age, especially self-esteem. Satisfaction of lower level needs are a prerequisite for higher level (growth) needs
Preferred method of Study	Experiments in controlled situations (animals and humans)	Experiential
Major causes of abnormal behaviour	The learning of mal-adaptive responses or the failure to learn adaptive ones in the first place, to distinguish between symptoms and the behaviour disorder	Inability to accept and express one's true nature, to take responsibility for one's own actions and to make authentic choices. Anxiety stems from denying part of self (referred to as identity crisis)
Preferred method(s) of Treatment	Behaviour therapy or modification, e.g. aversion therapy, behaviour shaping	Client-centred therapy; insights from the client come from the client as present experiences are explored with the therapist

**Source: Pont (1995:44)**

Human development is based on the premise that one begins with the person, the whole teacher. Behaviours are simply very limited extensions of a belief system, a concept of self and an orientation to life and work which can be misinterpreted as correctly as gauged. Behaviours are not ends in themselves, but a means to an end in empowerment. The 'end' of empowerment is a confident, competent, energetic and vibrant teacher who positively impacts children in the classroom as a real example of living and learning. This model links very well with the dimensions of empowerment – subjective and objective empowerment (Davidoff & Lazarus, 1997:162). Subjective empowerment refers to personal power where a teacher believes he or she can make the difference, where he or she feels confident, assertive to participate, innovate and engage in constructive development as a knowledge worker. Objective empowerment involves taking of power and creation of an enabling environment whereby teacher can participate and share in decision-making.

This inspirational, inquisitive and dynamic teacher is the ideal teacher who should remain in the classroom. The fact that there are some good teachers in schools, means that human development is possible (Steffy, 1989:8). The challenge remains to increase their number. This model continues to built on section 2.4 whereby the growth of teachers is dichotomised into career stages for the recognition of competence. Thus empowerment of teachers should be according to stages so as to make empowerment programmes more relevant, and the human development model takes into account the teacher's career stage.

The essential elements of this model include the assumption that people are basically good, that they self-actualise (Maslow, 1954), and become confident, contributing adults through the work environment. The relationship between the teacher and his/her immediate environment is crucial to the success of the organisation and central to the attainment of this model's outcomes:

The significance of this model is that it considers the human aspects of teachers that shape up teaching. The human aspects are discernible when teachers work within their roles and within schools – through their orientation toward work, their ideas of self, their vibrancy and their enthusiasm. However, these aspects change with time. Hence it is necessary to dichotomise the teacher's career into stages, not only for reward purposes but also for development. This model does not accept the existing working conditions as inevitable. Proponents of the model (Steff, 1989:xi) believe that a teacher is not the same all throughout his career life. His or her internal orientation is not the same (Brighouse, 1995:71). The same sentiment is cited by Jaworski (1993:37) who alludes that:

“no one can really change others, nor can they change one; people can only change themselves. The best that anyone can do is to provide a structure which helps other to change ...”

The teacher's internal orientation is fragile, permeable, regenerative and expandable. Because teachers are human, their orientation to work is renewable. Therefore, this model perceived changes in teachers' roles and their incessant quest for quality as fundamentally anchored in their internal orientation to work. Thus, motivating teachers is not a matter of immersing them in new approaches, rewarding them only, but recognition of the need for growth. People enter into teaching for various reasons. Therefore, monetary rewards are not the only means to maintain the teacher's level of motivation. Hence Steffy (1989:3) posits that:

“Over an extended period of time, repetitious tasks become less challenging. Less energy is expended. Excitement wanes. Enthusiasm slackens. Like any other human on a repetitious job, teachers get stale. They can lose interest”.

This may affect their classroom teaching. Therefore, the human development model promises to keep teachers' interest and enthusiasm on par with quality demands and immerses them in regular renewal programmes.

#### **3.2.5.4 Professional and competence development**

While the above model seeks to develop the internal orientation of teachers, this model enhance the teacher's technical skills, knowledge and attitudes. Although this model commits teachers to continuous development (Mda, 1998:77), it differs with lifelong learning in many respects. Its difference shall be established in the discussion below. In terms of Nolder (1992:37) this model is influenced throughout by the needs, interests and abilities of the person and by institutional constraints. And it also focuses on the teacher's ability to perform a task satisfactorily and encompasses intellectual, cognitive, and attitudinal dimensions as well as performance (Bridges & Kerry, 1993:12). Its critical outcomes are

- quality of teaching; and
- morale, motivation and professional status.

(a) The nature of this model

Professional (and competence) development is a whole-school activity. Therefore, everyone has the responsibility. However, for proper management of this process there is a need to appoint someone to steer the process – commonly known as development co-ordinator (Dean, 1992:102). Professional development stems from policy which sets priorities, creates structures, clarify roles and allocate resources for this policy. Basically, the success of professional development depends on the school climate which is founded on perceptions such as:

- respect for adults;
- genuine participation in decision making;
- interaction with peers which encourages innovation;
- a high sense of efficacy;
- opportunity to use and develop skills and knowledge;
- sufficient resources to support teacher experimentation; and
- reasonable congruence between teacher's personal goals and goals of the school in general (Collinson, 1994:31).

Professional development prospers in an open climate and very little in a closed climate (Calitz & Shube, 1992:32). The consideration of school climate entails that the individual teacher's values and experiences are taken into account. In this way, professional development becomes a combination of social system factors manifested in the culture of the school. This is to say that the social milieu also plays a significant role in the development of teachers (Open University, 1988:6). Furthermore, in terms of Trethowan (1991:59), Emmerson & Goddard (1993:16), Everard & Morris (1990:16) and Whitaker (1993:89) leadership style(s) play a major role in professional development depending on the person responsible.

Professional development involves a combination of methods, for

“any assessment measure taken alone is flawed because it is incomplete” (Bradley et al, 1991:140).

Different skills, knowledge and attitudes need different approaches. And also the individual aspect in teachers imposes different approaches, in pursuance of the following outcomes.

(b) Professional and competence development outcomes

Although the primary aims have already been outlined, it is necessary to demarcate professional and competence development activities taking into account the individual differences of teachers. Furthermore, there is a need to distinguish between individual and institutional aims. However, the divisions will not be spelt out here except for those related to professional development and those for competence development. Professional development activities are founded on the following objectives:

- (i) To maintain appropriate staff expertise and experience for current and projected courses.
- (ii) To ensure that each member is or becomes and remains a fully competent and responsible teacher of his or her subject.
- (iii) To encourage teachers to contribute to innovation in their own subject(s) and its teaching.
- (iv) To enable teachers to broaden and update their knowledge and to advance their personal development and their academic and professional achievements.
- (v) To permit teachers to change their subject and/or level at which they teach in order to cater for changing patterns of courses.
- (vi) To equip staff to cater for the social welfare as well as academic needs of students (Main, 1985:5).
- (vii) To recognise and employ teachers strengths in seeking the best teaching practices.
- (viii) To identify staff needs (Alyward, 1992:145).
- (ix) To improve communication and personal relationship and to encourage teachers to contribute to the maintenance of an academic community.
- (x) To enhance personal satisfaction gained by teachers from completion of tasks (Maslow's theory of motivation).
- (xi) To acquaint staff with changes taking place in the system and in their organisation.
- (xii) To provide feedback on individual progress and establishing needs for further development (Main, 1985:6).

These objectives have to be seen against the broad aims mentioned earlier, and they define development in terms of a person (the teacher) not an institution – that is, growth of the individual. The focus is on the individual-within-the-organisation and individual-within-the-community. It means that individual development is organisational development because these individuals will serve in the organisation. The reason why the emphasis of development is on the individual not the organisation is that quality is not produced by buildings or structures but by individual professionals. Hence professional development is preferred for high quality education. The notion of quality education invokes

competence which deals with an individual's ability to perform effectively in the context of an employment area. Quality demands in education require flexible and versatile teachers who are capable of responding to change, meeting change with enthusiasm and willingness to innovate (McAleavy & McAleer, 1991:20). Inherent in this postulation is that each individual teacher can fulfil effectively his or her role or function within an organisation. Hence professional development and competence development are intertwined, and are therefore not diametrically opposed to each other. Each complement the other as the following objectives of competence development illustrate:

- (i) Extension of knowledge.
- (ii) Consolidation and re-affirmation of knowledge.
- (iii) Continual acquisition of knowledge.
- (iv) Familiarisation with curricular development.
- (v) Acquaintance with psychological development.
- (vi) Introduction of new methods.
- (vii) Understanding cultural revolution.
- (viii) Familiarity with changes in local and national policy (Mohlakwana, 1996:23).

The notion of individual development is still maintained in these objectives. It represents a candid and sincere way of keeping track with weaknesses, failures and shortcomings in a teacher (Walker, 1993:50). It is relevant to the South African human resources management context which is predominantly characterised by redress and equity to develop the disadvantaged groups so that they will offer quality education.

(c) Basic assumptions

Effective professional and competence development are based on the assumption that individual teachers learn to design, develop and offer quality lessons in the classroom when their development:

- (i) provides focused direct instruction on the procedures of sound assessment practice;
- (ii) provides classroom practice in applying quality principles;
- (iii) gives teachers responsibility for managing their professional and competence development;
- (iv) involves educators in collaborative learning activities and collegial support groups;
- (v) encourages a healthy concern for student well-being; and
- (vi) provides maximum impact for teachers in terms of the efficiency and effectiveness of their practices while minimising the amount of time and energy invested (Stiggins, 1995:15).

What is acknowledged here is that some practices will be counterproductive such as disadvantages of external consultants (see section 3.2.4.2(vi) of this chapter), giving teacher short courses with no linkage to classroom practice, no follow-up and continuity. Therefore, it is important that, when engaging teachers in development activities, the areas relevant for teaching should be of primary value.

(d) Areas of development

Although development focuses on skills, knowledge and attitudes, one finds that (McAleavy & McAleer (1991:20) development is a wider concept, its relevancy is shown by responsiveness to:

- (i) Technical or task skills – those specific skills which enable the job holder to deliver the key purpose of the role.
  - Relevant teaching skills – the basic teaching skills of questioning, explaining, tutoring, discussing, demonstrating, analysing, comparing, synthesising, facilitating, etc.



- (ii) Contingency management skills – those skills needed to manage variance and unpredictability in the job role and the wider environment.
  - Relevant teacher skill – flexibility of response including, management and control skills, a willingness to conduct self-monitoring/self-evaluation and undergo professional and/or competence development.
- (iii) Task management skills – those skills which are overarching and which integrate the various technical and components into the overall work role.
  - Relevant teacher skill – the ability to plan, implement, assess, evaluate, to identify areas which require improvement and develop methods of self-evaluation; to make best use of new and existing technology and work with others.
- (iv) Role or job environment skills – those skills which are used to integrate the work role with the context of the wider organisational, economic market and social environment.
  - Relevant teacher skill – developing an awareness of the importance of the social context of the curriculum.

Therefore, development (professional and competence) is an all-round concept which covers a wide range of areas in the context of education. These areas are practically expressed, for the recognition of competence, as (Tomlinson, 1995:308):

- (a) Explicit knowledge base which includes:
  - subject knowledge and skills, curriculum resources;
  - pupils and pedagogy; and
  - professional matters and commitment.
- (b) Planning and preparation which embraces:
  - clear learning goals appropriate for pupils, context, resources; and
  - adequate range of learning activities and resources for pupils, goals and resources.

(c) Interactive teaching which is manifested in:

- intelligent and effective assistance on pupil learning, organisation and resourcing;
- effective assessment and monitoring of pupil learning activities and progress;
- appropriate relating to and influencing pupils, the behaviour, motivation and well-being.

(d) Wider professional roles which entails:

- wider educational role fulfilment through effective collaboration with various others.

(e) Professional self-development which covers:

- development of explicit knowledge base of subject, pedagogy and professional matters; and
- improvement of professional capabilities through appropriate mentoring, reflection and change.

### 3.2.5.5 *Induction*

It is commonly held that induction is meant for newly employed individuals (Finnigan, 1983:86; Everard & Morris, 1990:89 and Rebore, 1991:136). This perception stems from the idea that new appointees need to be acquainted with the reins of the profession. Their package includes: textbooks, logbooks, description of the school, mission statements, school policy, guided tour on the school premises where they are shown toilets, classes, sports ground, administration offices, other teachers, etc. However, Büchner & Hay (1998:19) contend that induction is meant for old staff members as well because they have to cope with increasingly complex situations in terms of multicultural classrooms, new methods of teaching, new curriculum, new paradigms, etc. Furthermore, when a staff member is promoted (mobility within the career ladder), he or she need to be schooled on the elements of his or her new job. Therefore, induction

is meant for both new appointees and 'old' staff members. In that note induction can be defined as

"a systematic programme of professional initiation, guided experience and further study (Morant, 1981:6)".

Thus, induction is appropriate to teachers who starts to work in a new environment – new appointments, reassignment to a new school, promotion as head of department, deputy principal or principal and a sideways move from one job to a similar one elsewhere. Hence, according Emmerson & Goddard (1993:89) induction encompasses the familiarisation process and is a continuous process of development. Induction enables individuals to take increasing responsibility for the satisfying of the personal and professional needs. It is a mode which the HRM use to create conditions for growth, for defining challenges, setting goals and targets. Induction is premised on the following key assumptions:

- (i) Each person is a unique individual, worthy of respect.
- (ii) Individuals are responsible for their own actions and behaviour.
- (iii) Individuals are responsible for their own feelings and emotions for their responses to the behaviours of others.
- (iv) New situations, however unwelcome, contain opportunities for new learning and growth.
- (v) Mistakes are learning experiences and are seen as outcomes rather than failures.
- (vi) The seeds of growth are within us. Only we ourselves can activate our potential for creativity and growth.
- (vii) We can all do more than we are currently doing to become more than we currently are.
- (viii) Awareness brings responsibility and responsibility creates the opportunity for choice.
- (ix) Our own fear is the major limiter for growth.
- (x) Growth and development never end (Whitaker, 1993:44-45).

In a similar manner, the notion of induction continues to build on what the other models have developed. Likewise induction programmes are aimed at empowerment of teachers by explaining job elements to them.

(b) Aims of induction

The following are universal objectives common to induction programmes:

- (i) To make employees feel welcome.
- (ii) To help the employee become a member of "the team".
- (iii) To inspire employees towards excellence in performance.
- (iv) To help employees adjust to the work environment
- (v) To provide information on the community, the school district, systems, building, department and students.
- (vi) To acquaint the individual with other employees with whom he or she will be associated.
- (vii) To facilitate the opening of school each year (Rebore, 1991:137).

(c) Essential components of induction

The essential components of induction include support, time, information (about the school, district, job description), familiarisation (with the school, its routines, its buildings, its staff and its learners), training and development opportunities (Emmerson & Goddard, 1993:89).

(d) Essential elements of induction

Essential elements of induction refers to the mode in which induction is unfolded to socialise personnel to gain their commitment and confidence, clarify goals and values (Kinlaw, 1995:10). These elements are a capital invested with the projected dividends being connectedness, belonging and self-confidence in staff. Among others, these elements or modes include : mentoring, counselling, tutoring, coaching.

(i) Mentoring

Mentoring is the process through which recruits are supported in the organisation by a colleague allotted to fulfil that support role (Büchner & Hay, 1998:20). Turner (1993:36) sees the role of a mentor evolving into the role of an exemplar – who demonstrates teaching and management techniques; peer supervisor – who observes and gives feedback; curriculum management adviser – who helps with lesson and longer term planning, “supervisor of classroom researcher – who encourages teachers to become reflective practitioners who engage in continuous self-evaluation; and also provider of a resource and consultancy service. In the same vein, Pont (1995:97) defines mentoring as:

“a process in which one person (mentor) is responsible for overseeing the career and development of another person (protégé) outside the normal manager or subordinate relationship”.

Mentoring is a protected relationship in which learning and experimentation can occur, potential skills can be developed and in which results can be increased in terms of competencies gained rather than curricular territory covered.

There are various reasons why mentoring should be introduced in organisations besides the general reason of empowerment. Among others, the following suffices :

- To support a self-development programme.
- Faster induction.
- Increased retention of staff.
- Better identification of potential.
- Ensuring professional qualifications are maintained.
- Development for the mentor.
- Building relationships (Pont, 1995:99).

Given the commitment, mentoring can work in schools.. It proves to be the cost-effective way of developing talent and increasing staff awareness of what is taking place in the organisation. Its common benefits to organisations include:

- Improved succession planning and management development.
- Faster induction of new employees.
- Better communications.
- Reduced training costs.
- Increased productivity.
- Reduced labour costs (Pont, 1995:99).

Likewise, the protégé also benefits from mentoring in form of receiving support for professional, teaching, career planning, knowledge of the organisation, role modelling and commitment.

#### (ii) Counselling

While for most of the time most teachers can deal with their own problems, everyone at some stage of their career life is in need of help. No man is an island and no one is in the situation where they will never need the help of others. The range of problems that affect teachers is very wide, hence it is necessary to give them an opportunity to explore, discover and clarify ways of living more resourcefully and towards greater well-being. This requires a set of techniques, skills and attitudes for teachers to manage their own problems using their own resources (Pont, 1995:137). Consequently, counselling comes in handy to facilitate in teachers self-knowledge, emotional acceptance and growth, and helps them deal with problems such as:

- employment – rationalisation; redeployment; strikes; dismissal; transfer; relationships with colleagues, principals, learners and parents.
- physical – AIDS/HIV, TB, cancer, disability, etc.
- emotional – depression, anxiety, threats, trauma, etc.
- family – aged parents, child abuse, domestic violence, etc.
- marital – divorce, separation, impotence, etc.

- relationships – partners, neighbours, racial/sexual harassment, etc.
- crime – burglary, hijacking, etc.
- substance misuse – alcohol, drugs, etc.
- bereavement/loss of next of kin.
- having – repossession, homelessness, etc (Pont, 1995:137).

Becoming aware of these problems does not mean that managers must become counsellors. However, it is necessary that managers:

- develop an awareness and use of basic counselling skills which will probably be used in developmental appraisals and in addressing minor problems affecting the employee;
- become aware of the power of consoling and its benefits; and
- become aware of their own limitations and know when to request external help.

The following are the counselling outcomes for managers:

- (i) Accurate descriptions of problems and their causes;
- (ii) Technical and organisational rights;
- (iii) Venting of strong feelings;
- (iv) Changes in points of view;
- (v) Commitment to self-sufficiency; and
- (vi) Deeper personal insight about one's feelings and behaviour (Kinlaw, 1993:22).

Counselling can help people with personal problems which may range from severe to minor. At some time one may need merely the opportunity to talk to someone and put the issue in perspective. We all need to unload on someone else and find a sympathetic ear. This may bring positive results in teachers. There is a need to establish therapeutic relationships whereby teachers with problems are made to feel the warmth and acceptance within the organisation. Therefore, there should be the freedom to express ideas, feelings and attitudes

(Burger, 1994:16). This will foster a balanced approach to development and empowerment, and having respect for the teacher's viewpoint and approaches.

By counselling one does not suggest that managers must go all out to look for 'affairs of teachers', but it means that managers have to be objective by maintaining a psychological distance and yet being sensitive and patient to teachers. As such the teacher(client)-manager(counsellor) relationship should be characterised by:

- An empathetic attitude
- Staying the client's problem
- The client feel free to say what he or she wants
- An atmosphere of mutual trust
- Rapport
- The client is free to make his or her own choices
- An atmosphere of tolerance (Burger, 1994:18)

Teachers and managers should know that asking for help is not a weakness but a sign of strength in that it opens our limitations, and ventures into a mine-wealth of new possibilities for growth and development. Hence it is necessary to explore other modes of induction such as coaching and tutoring.

### (iii) Coaching

Coaching is a process by which managers stay in touch with subordinates. In terms of Sebolai (1995:53) coaching is an informal system whereby a manager transfer knowledge, skills, attitudes and standards to a subordinate or whereby he or she provides feedback. Coaching is relevant to empowerment when seen as:

"the process of achieving continuous improvement in an organisation's performance by developing and extending the competent influence of individuals and teams over the areas and functions which affect their performance and that of the total organisation" (Kinlaw, 1995:37).

The power to improve teachers performance requires managers to systematically increase the ability and the experience of teachers by giving them planned tasks coupled with continuous appraisal advice. Coaching will release the latent talent and skills, previously untapped by training (Pont, 1995:148). Coaching has as its primary goal the achievement of individual potential rather than giving basic skills as it is the case with training. Coaching helps teachers go beyond the basic requirements to release the skills that have not yet been released. In other words it develops the individual's potential to the full. Therefore, coaching will help in the retention of excellent teachers in the classroom.

The benefits of coaching are wide and varied and relevant to all educators – old and new. Coaching allows individuals to improve their performance on the job. To new recruits it is a means of familiarisation and orientation into the new organisation, new culture, new systems and procedures. For longer serving employees, it is a means of stimulation and tune-in to offer satisfaction and credibility of new systems, new culture effected by changes and developments. It ensures that years of accumulated experience are passed on to others. Coaching enable individuals who possess the potential to deliver excellent performance. People usually have greater aspirations than a manager realises and most want to be excellent performers. Coaching opens up the communication channels between the manager and the subordinate, usually making for improved relationships. Good relationships, in turn, make for a better and more productive working environment. And finally, the costs are low, so that a return on investment should soon be evident.

(iii) Tutoring

Induction may also take a form of tutoring. A tutor is an individual saddled with the responsibility to supervise initial training students on teaching practice; he or she inducts, supports and evaluates probationary teachers and is responsible for continuous development (Turner, 1993:36). Kinlaw (1993:22) identifies the outcomes of tutoring as:

- Increased technical competence;
- Increased breadth of technical understanding;
- Movement to expert status;
- Increased learning pace; and
- Commitment to continual learning.

All these modes are attributes of induction. The manager may decide to use any of these or a combination. Each has its own benefits. What remains is to establish who is responsible for induction because it appears that induction is critical to the restoration of the culture of teaching and learning and to development and empowerment of teachers as excellent practitioners who are to remain in the classroom.

(e) Who should induct teachers?

The act of induction requires someone who has been there for a long time. Someone who can guide and is trusted because of accumulated experience (Büchner & Hay, 1998:22). Turner (1993:41) suggests that the role of a mentor, counsellor, coach or tutor should not be assumed by the headmaster except where there is no alternative. This is because the headmaster is often viewed as authoritative and new recruits may not be free to actualise themselves fully. Ideally, any member of staff who has earned the respect of his or her colleagues is eligible. However, delegation of mentorship to a member of staff who is

uncertain and unscrupulous should be discouraged as their influence on the mentee and the organisation may create dysfunctionalities.

Quality mentors should incorporate the following requirements:

- (i) The ability to listen, observe and diagnose, and knowing when to interrupt and intervene.
- (ii) An understanding of human nature and psychology – in areas such as motivation, skill acquisition and goal setting.
- (iii) Recognising the importance of individual feelings and knowing when to spend time dealing with these feelings rather than directing efforts towards improved performance alone.
- (iv) Having awareness of one's own strengths and weaknesses. Self-awareness is recommended.
- (v) A caring, supportive and patient nature.
- (vi) Good verbal skills, especially in feedback (Pont, 1995:154).

In addition, the officer should exhibit the following values in his or her conduct:

- Empathy
- Genuineness
- Warmth and respect (Burger, 1994:20)

Thus, in that way teachers will be empowered. It has been noted from the above discussions that empowerment is generally about power relations – about influence. This affects the way an organisation is structured and the way people in leadership positions relate to other members of the school community. If too much power is held within the leadership and management structures of the school, it is likely that the school will not be functioning optimally, because the contributions of others will be constrained by this imbalance of power. The challenge is that people who hold positions of power should ensure that all other

role-players in the school feel able to participate meaningfully in the life of the school (Davidoff & Lazarus, 1997:162).

This requires the transformation of schools from a collection of "I's to a collective "we", and this will provide all other role-players a collective sense of identity and belonging. For the purpose of the above transformation there is a need for a shift in paradigms of power from a paradigm of "power over" to a paradigm of "power to". In terms of Sergiovanni (1994:198) such a change requires bonding and binding in which "communities" are established in schools. Once a community of mind emerges, schools become a place where people care for each other, help each other, devote themselves to their work, and commit themselves to a life of inquiry and learning. In this way leadership will be viewed as an influence relationship among leaders and followers who intend real changes that reflects their mutual purposes.

Empowerment is important simply because it is a basic human need to feel a sense of control over your life. Without this assurance, people tend to feel disconnected, undervalued and ultimately they become less engaged in their work. It is very difficult to put your heart fully into something if there is a fundamental sense of lack of control. It is very difficult to give fully in any context if people are lacking in confidence and assertiveness. The programmes and models discussed above have clearly indicated the role of confidence and assertiveness in the restoration of the culture of teaching and learning. Teachers who are to be retained in the classrooms should be the ones who are confident and assertive. Thus, empowerment is fundamentally geared towards attainment of confidence and assertiveness.

Likewise, effective managers should have self-confidence, self-knowledge and willingness to share with others. Empowered leaders should recognise that they cannot do everything in their own, and that far more is achieved by working collaboratively with others. Finally, educational managers should note that power

is something that is to be shared with different members of the staff. When people participate in shaping the life and direction of their institutions, the capacity is enhanced. Therefore appropriate structures and processes need to be put in place to facilitate such participation. This is referred to as capacity building – which is the topic for discussion below.

### **3.3 CAPACITY BUILDING**

#### **3.3.1 Orientation**

The imperative of transformation of the education can be understood from the persistent legacies of apartheid in education: “One of the most visible legacies of apartheid is the complete fragmentation of the education system. The fragmentation went deeper. Education was sharply separated from the world of work and training; schools had very little contact with institutions responsible training teachers; in-service educators had little or no contact with colleges of education; technical colleges and technikons had very little to do with each other or with universities (Department of Education, 1996:17).

Apartheid led to an education system characterised by racial, region and gender inequality as well as ideological distortions in teaching and learning. The neglect of the quality of African education led to the disintegration of learning environments and the death of a culture of learning and teaching. The demise of the culture of learning and teaching was exacerbated by irrelevant curriculum (Flurry, 1996:26). Schooling was provided on racial biaseness – with White schools getting more key resources while black schools were the most disadvantaged. In African schools, the inadequate supply, low qualifications and poor morale of black teachers took its toll (Ashley, 1993:9; Department of Education 1997; Department of Education, 1998:50), creating despondency and apathy in many school communities. Students and schools in rural areas were, and still are, the hardest hit. High repetition and dropout rates are common.

There was insufficient support for teacher except in form of short in-service courses in didactic matters. The education system was fraught with problems ranging from education management, poor working conditions, and inadequate resources to discrimination. Hence, “during the 1970’s and 1980’s the school itself became a site of struggle in the resistance to apartheid. In many cases the resources and relationships which make the school an institution were almost completely destroyed. In other cases new patterns of conduct and networks emerged – some moulded in a culture of resistance, some strengthening resistance to change”. While these may have been effective in the years of struggle, they require reconstruction as well as transformation if the imperative of quality learning and teaching is to be achieved.

In order to facilitate quality teaching and learning, there is a dire need for management, institutions and personnel capacity to be enhanced. This ideal is steered by policy which:

“provided the historic bridge between the past of a deeply divided society characterised by strife, conflict, untold suffering and injustice, and a future founded on the recognition of human rights, democracy and peaceful co-existence and development opportunities for all South Africans, irrespective of colour, race, class, belief and sex” (The White Paper on Education and Training, 1995:17).

This statement provides a vision which explicitly commits educational managers to redress past imbalances and inequalities. However, capacity building seems to be a mammoth task when viewed in the light of challenges ranging from:

- dysfunctional structures,
- work ethos,
- appropriately skilled people,
- confusion of roles and responsibilities at different levels of management,
- poor coherence and co-ordination of resources,

- crisis management,
- poorly articulated programmes,
- mix of old and new styles of leadership,
- separate education and training tracks,
- weak linkage with industry,
- adverse organisational ethos and the culture of teaching and learning,
- a distorted labour market,
- inadequate and skewed funding, to
- weak and perverse incentives, etc. (Department of Education, 1996:28; Department of Education, 1998:8-9, 50-51).

### **3.3.2 Capacity building outcomes and basic requirements**

The central thrust of capacity building is to improve the quality of teaching and learning by enhancing and developing the capacity of institutions and individuals who serve in those institutions. Therefore, the aims of capacity building are focused on addressing the following basic requirements:

- Strategic direction
- Organisational structures and systems
- Human resources
- Infrastructure and other resources
- Networking, partnerships and communication (Department of Education, 1996:10)

Thus, capacity building is explicitly linked to Reconstruction and Development Programme (RDP) capacity building aims at:

- (i) The development of an integrated system of education and training that provides equal opportunities to all irrespective of race, colour, sex, class, language, age, religion, geographical location, political or other opinion.

- (ii) Education must be directed to the full development of the individual and community, and to strengthening respect for human rights and fundamental freedoms.
- (iii) Designation of a new national human resources development strategy that is based on the principles of democracy, non-racism, non-sexism, equity and redress.
- (iv) Provision of development opportunities in accordance with national standards.
- (v) And education management development (EMD).

Consequently, the outcomes of these activities include enhancing:

- (i) the capacity to deliver by creating an environment conducive to quality education; to organise, plan, co-ordinate, systematise and structure; to facilitate, guide, support and enable; and to provide effective leadership in achieving educational goals;
- (ii) the capacity to learn and reflect by assessing and monitoring systems and processes, and to learn from that evaluation;
- (iii) the capacity to mobilise and use resources efficiently by harnessing new resources while at the same time making best use of existing, financial and human resources, and to work in partnership in so doing; and
- (iv) the capacity to innovate as shown when teachers work effectively towards paradigm shifts; organising the process of transformation and change.

Therefore, the prime aim of capacity building is to ensure that teachers and together with their environment are developed by creating an enabling environment whereby teachers are able to excel. In this way, their competence is enhanced. Table 3.4 clearly illustrates capacity building programmes in the Ministry of Education.

**Table 3.4: Capacity building in the Ministry of Education**

POLICY OBJECTIVES	PROGRAMMES	TARGETS	INSTITUTIONAL REFORMS	LEGISLATIVE PROGRAMME	FINANCIAL ARRANGEMENTS
1. Improved access to all levels of education	1. School building and rehabilitation	1. More equitable student-teacher ratios	1. Reorganise divided education depths into single national dept and 9 provincial depths	1. Single national education department	1. Education budget
2. Provide high quality education	2. Teacher education and development	2. Improved rural class ratios	2. Establish council of education ministers	2. National qualifications framework	2. RDP – supplement
3. Provide increased equity and efficiency	3. Electrify schools	3. Improved learning outcomes	3. Derive new system of consultative bodies of stakeholders	3. Provision of training in collaboration with the department of labour	3. Develop funding – partnerships
	4. Education quality improvement programme (EQUIP)	4. Improve attendance, participation and retention rates	4. Review current institutional forms of delivery, i.e. schools, colleges, technikons, universities, etc.	4. Consultative framework	4. Grant & Loan finance in consultation with RDP and finance
	5. School governance	5. Reduction of age profile of students		5. Employment and conditions of service	5. Private household financing especially of higher education
	6. Student health promotion and nutrition	6. Reorient enrolment towards science, maths and technology			
	7. Adult basic education	7. Internal & external efficiency in teacher and technical college			
	8. Early childhood development				
	9. Tertiary education loan and bursary fund				

Source: White Paper on Reconstruction and Development (1994:62).

This table illustrate direct and certainties of development in education, and they will dictate future education management development practices and policies. Equally, recognition of competence will be influenced in institutions. Hence, Combs (1981:369-370) posits that capacity building has the following educational implications:

- (i) We can never again hope to design a curriculum to be required of everyone. A common content is simply no longer a valid goal of education.
- (ii) The new goal of education is intelligent persons. Tomorrow's citizens must be effective problem solvers, persons able to make good choices and to create solutions on the spot. Hence the need to retain excellent teachers in the classrooms.
- (iii) Education must be a creative process not tied to any particular subject. One can solve problems effectively in any area of human endeavour.
- (iv) Education should emphasise democratic values so that a future of choices becomes a reality.
- (v) A future of change demands lifelong learning. The idea of an education completed at any given age or within any finite period is obsolete for the world in which we are moving.

Therefore, capacity building should resonate with economic changes whereby professions (including teaching) should be geared towards the rapid development economic fabrics. That is to say that the agenda for capacity building needs to address both qualitative as well as quantitative changes (Christie, 1996:408) if it is to succeed. Equally, it should commence by addressing the legacies of apartheid.

### **3.3.3 The Legacies of apartheid**

Although section 3.3.1 of this chapter has endeavoured to address this issue, the following issues merit attention.

#### **3.3.3.1 *The education management legacy***

In terms of the Department of Education (1996:18) the crisis in schools can be attributed to the lack of legitimacy in the education system as a whole. In the majority of schools this led to poor management and to the collapse of teaching and learning. In many schools, decades of resistance to apartheid discredited many conventional education practices such as punctuality, preparation for lessons, innovation, individual attention and peer group learning (Lethoko, 1999:26-36). To aggravate matters, some school principals were discredited as being 'sell-outs'.

Recent changes to the system of governance in education have resulted in school heads being unprepared for their new role as 'chief executives'. Consequently, the information systems in a large number of schools have broken down, and the necessary management competencies for professional growth, incentives and assessment are non-existent. Principals and teachers have been at the receiving end of the system failure even though they worked in regulated environment whereby the top-down structure was used. They consistently received instructions from the officials of the department with little input from them. As such, the departmental administrative units (District and Circuit Offices) were unable to respond to local needs.

Furthermore, the situation was exacerbated by the rejection of school inspectors who tended to be authoritarian bureaucrats engaged in 'policing' teachers and principals. As a result, many schools have no contact with circuit or district

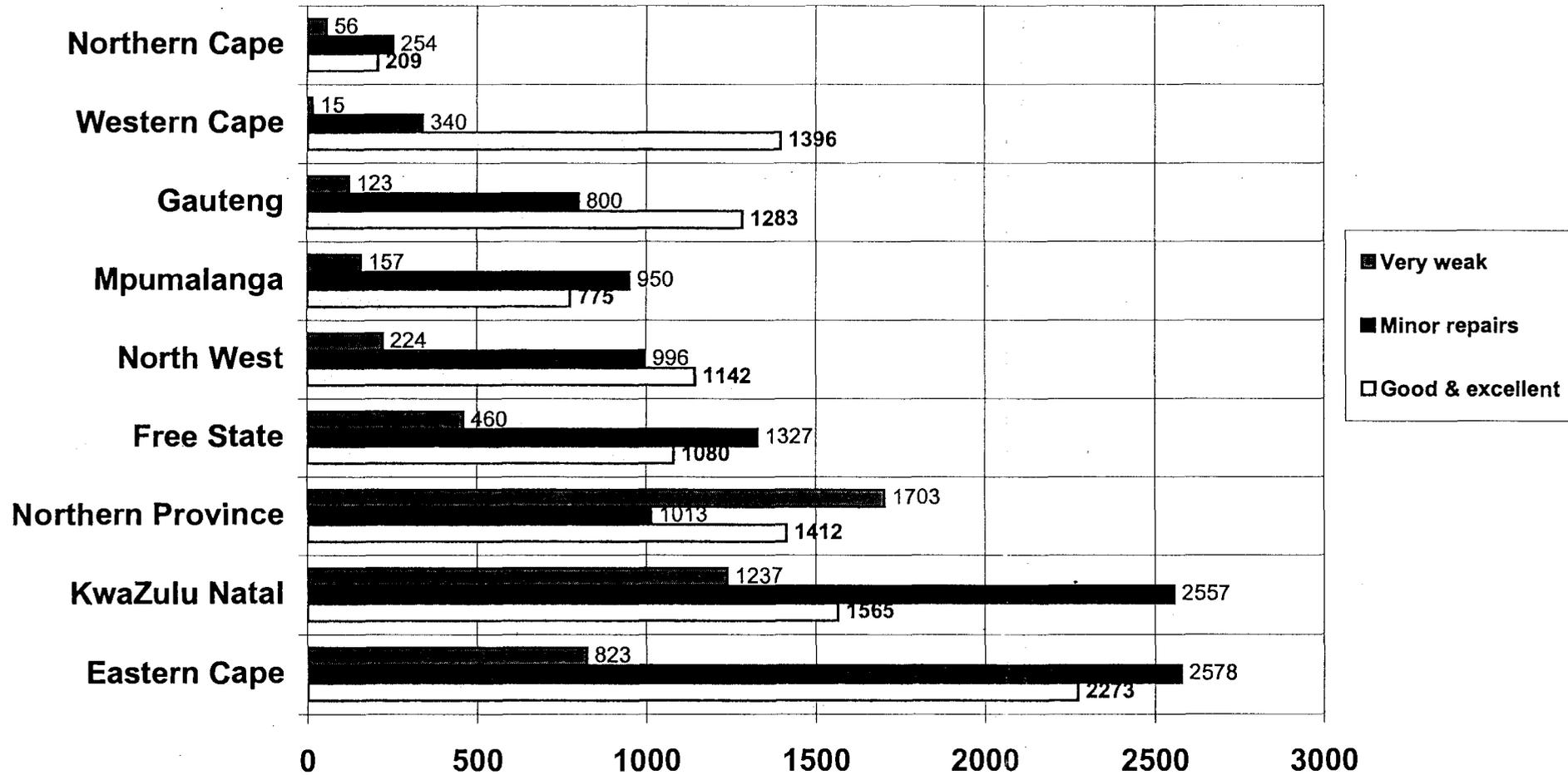
offices (Department of Education, 1996:20). Therefore, capacity building must address these anomalies in education management.

### **3.3.3.2 *The legacy of allocation of resources***

The way in which resources (teachers, classrooms, books, expenditure, etc.) were allocated during apartheid reflect a skewed approach. It means the present system is faced with a huge disparity between races as the methods used were race biased. Furthermore, the situation differs from urban townships to rural areas. The latter's problems seem to be out of proportion while the former's problems were aggravated by arson, violence, vandalism and crime (Metcalf, 1995:3). According to Metcalfe (1995) many schools need repairs and renovations and more money should be 'pumped' in for day-to-day maintenance.

The national picture, in terms of the Department of Education (1997)'s School Register of Needs Survey reveals a glaring disparity in individual provinces – with provinces which are predominantly rural suffering the aftermath's of apartheid. However, the Northern Province, as shown in figure 3.1, appears to be severely affected.

Figure 3.1: Number of schools according to condition of buildings (National)



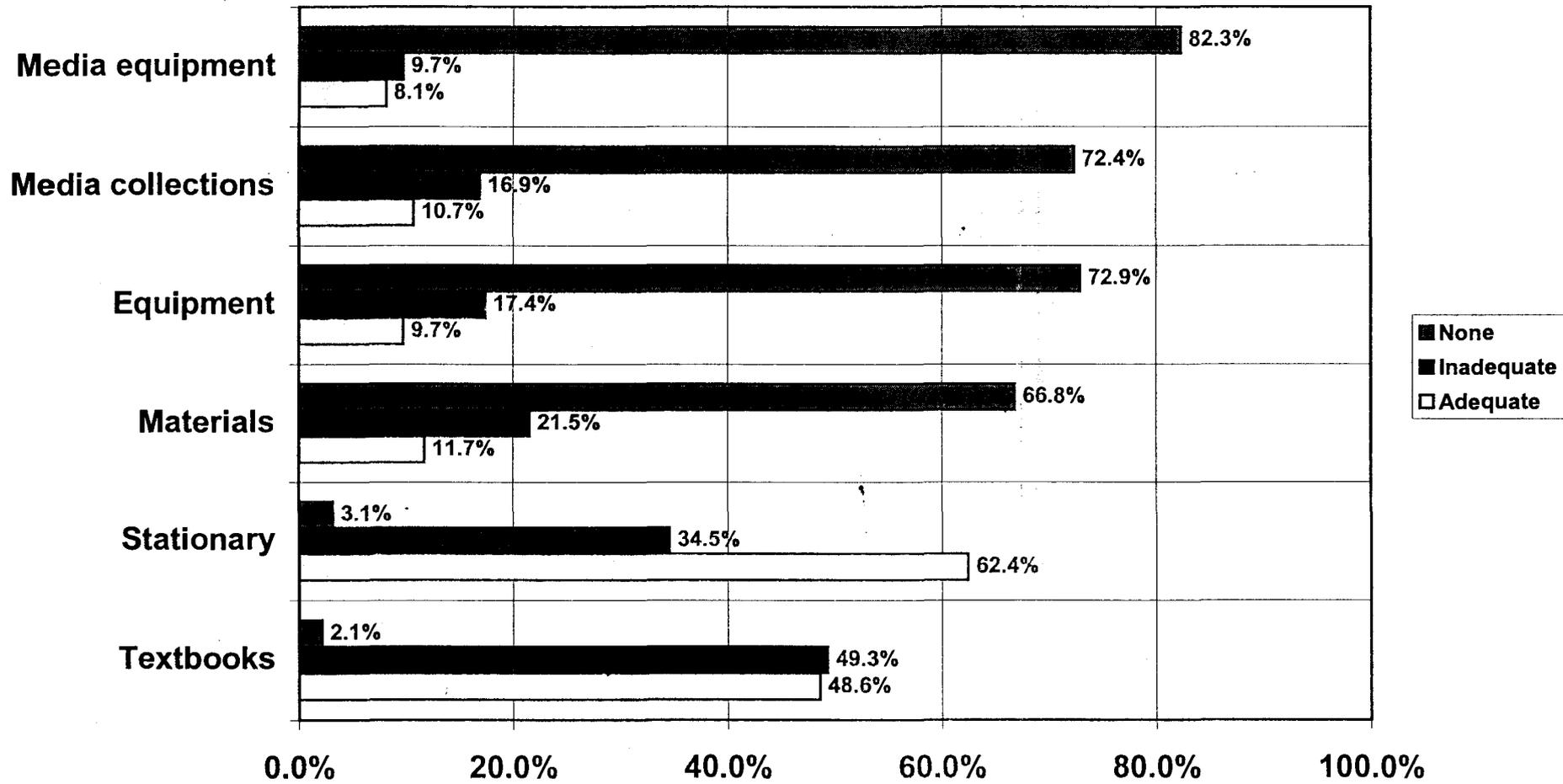
Source: Department of Education , 1997.

The way education in South Africa has developed historically means that we are confronted by serious inequalities of provision between different sections of the population. While it is clear that apartheid is dead, its legacy remains to haunt democratic endeavours. Hence it is necessary that the manifestations of inequality in the following areas must be addressed:

- (i) Expenditure : Even though equitable funding is contemplated in the new policy (Department of Education, 1996), there is a need for a rigorous programme because according to Thompson et al (1994:57) "providing equal dollar inputs for unequal students produces unequal results. Equal spending does not make education the great equaliser of the conditions of men. ... If education is to facilitate the movement of the poor and disadvantaged into the mainstream of social and economic life, if it is afford everyone equal probability of success, then equal facilities, teaching skills, and curriculum's are not the answer. Additional resources must be made available to" the disadvantaged groups. This is necessary and critical even though the gap in the per capita expenditure has been narrowed (Ashley, 1993:8). The situation is obviously still substantially unequal.
- (ii) Provision of School Buildings, Classrooms and Equipment

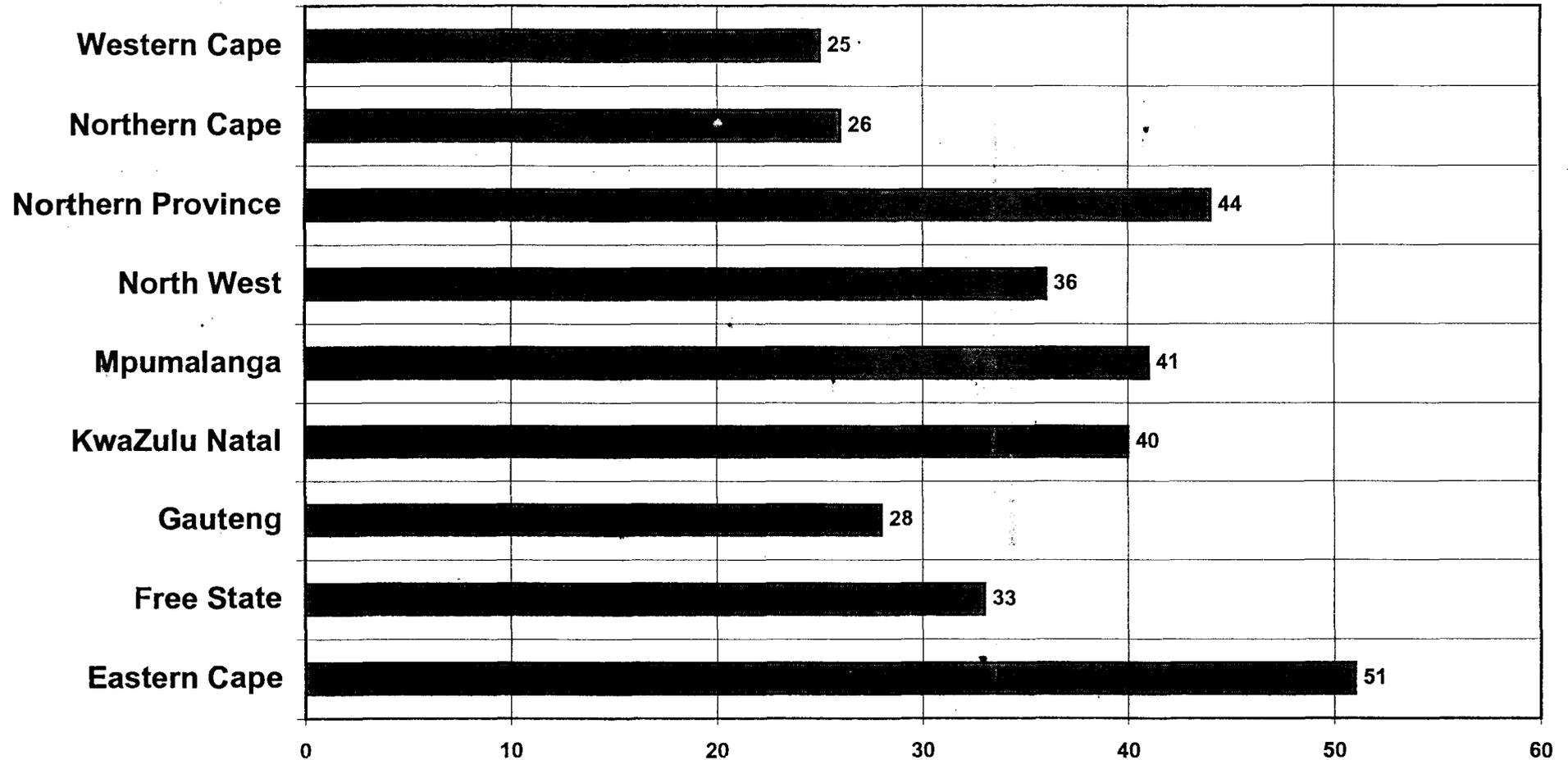
The following figures reveal that capacity building remains a daunting task.

Figure 3.2 : Provision of resources to schools (National)



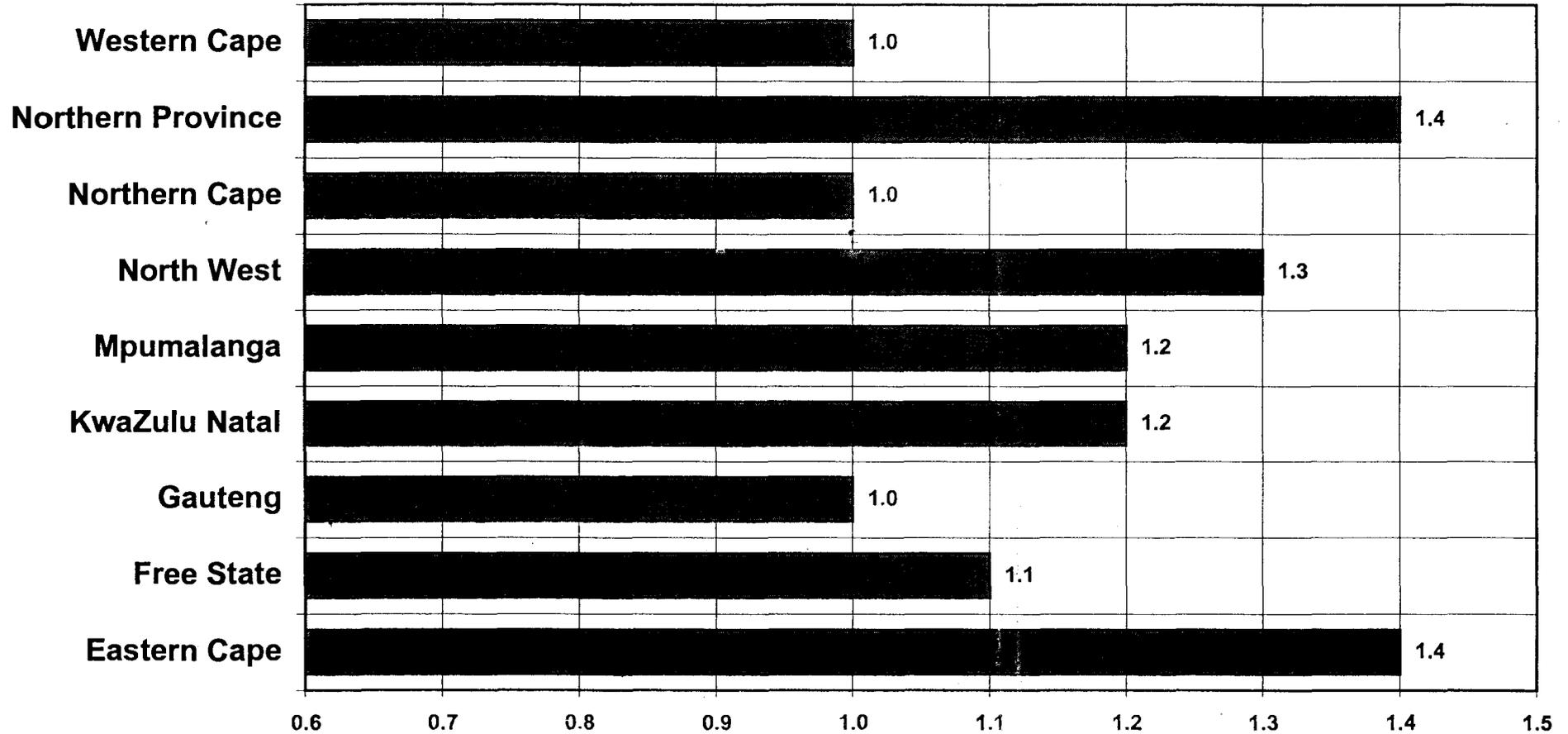
Source: Department of Education , 1997.

Figure 3.3: Learner-classroom ratio (National)



Source: Department of Education , 1997.

Figure 3.4: Educator-classroom ratio (National)



HSRC, Education Foundation, RIEP, Department of Education

However, Black schools are hopelessly under-provisioned. These figures portray the national situation, but not individual race cases. The greatest challenge is to apply the principle alluded to by Thompson et al (1994). The status quo cannot be maintained. Policy endeavours must be translated into action whereby critical resources are allocated to all equitably. Without such allocation the ideal of quality teaching and learning will elude us.

### 3.3.3.3 *The gender legacy*

Past practices in education management reflect broader discriminatory tendencies against women. Women remain invisible in management positions even though they are a majority in the society (Central Statistical Service, 1996 – shows that they constitute 51% of the population) and in the profession (Department of Education, 1997:198).

**Table 3.5: Educators according to Rank and Gender 1994**

	Female		Male		Total	
	Count	Percentage	Count	Percentage	Count	Percentage
Principals	9 790	42%	13 798	58%	23 588	100%
Deputy Principals	2 045	31%	4 480	69%	6 525	100%
Heads of Department	13 452	50%	13 676	50%	27 128	100%
Teachers	194 125	68%	90 537	32%	284 662	100%
Total	219 412	64%	122 491	36%	341 903	100%

Source: Edusource Data News. No. 10. October (1995).

While men make up 36 percent of all teachers in South Africa, they hold 58 percent of principal posts, 69 percent of deputy principal posts, and 50 percent of head of department (Department of Education, 1997:198). These statistics reveal a glaring discrimination against women. It has become part of the

organisational culture and is entrenched in hidden and basic assumptions which drive the invisible life of the organisation (Mitchell & Correa, 1997:84).

As such capacity building should be seen as a critical intervention to normalise the situation and enhance the capacity of women to assure them leadership positions in schools.

#### **3.3.3.4 *The legacy in training and development***

Training and development practices of the past have tended to focus on the collection of qualifications and certificates with little attention being paid to actual competence to transfer this newly acquired knowledge in the classroom. This narrow focus on training and development is reflected in many of the courses and programmes offered by NGOs and Higher Education (Department of Education, 1996:24; Hofmeyr, 1997:47).

This is due in part because South Africa lacks a national strategy for dealing with the development needs of teachers. Courses tend to be menu-driven and not relevant to teachers' needs. The problem is exacerbated by lack of financial resources and infrastructure (Department of Education, 1996:24). The National Teacher Education Audit (Hofmeyr, 1997:47) made an investigation into this area and finds that:

- Teacher education is fragmented – no link between pre-service teacher education (PRESET) and in-service teacher education (INSET).
- There is a proliferation of private pedagogy and distance education – thus resulting in overproduction of teachers often in one stream.
- Most teachers enter teaching out of frustration and failure to meet requirements in other fields – so education provides them with an easy entry to tertiary education.

Therefore, capacity building must address these inefficiencies. Quality teacher education will ensure quality education in the classrooms. And this is the brief of the following programmes.

### **3.3.4 Capacity building programmes**

Capacity building should be associated with the notion of utility in education, whereby the main concern is usefulness but not knowledge for the sake of knowledge (Brann 1979:24). In terms of this predisposition teachers should be regarded as worthy resource than merely a means to quality education. Utilitarianism should govern capacity building and permeate education in general. Utility in education has three aspects, namely:

- learning undertaken for use in further learning;
- education regarded primarily profitable to oneself;
- and education intended to fit one to serve others.

Issues related to this aspects were discussed in section 3.2.5 of this chapter. This section will continue to build on this sections. Capacity building should be seen as a submodel of empowerment in that it also addresses the issue of improving the teacher's professionalism by focusing on the teacher's academic development, professional and career development, management skills and coping with changes in education (Reddy, 1992:5). However, the main thrust of this section will be equity considerations, and other related issues.

#### **3.3.4.1 *Anti-discrimination programme***

Historically South Africa emerges from the debris of apartheid whereby development of skills, knowledge and expertise were afforded certain groups while the large section of the population was sidelined. Hence the misconception of competence is associated with certain groups. As such, the backlogs created

by the erstwhile dispensation should be addressed as matter of urgency. The education system should refrain from withholding or limiting access to opportunities, benefits and advantages that are available to other members of the society. It means that discrimination should be rooted out in education. Education cannot afford:

“the practice or act of making distinction between people based on such characteristics as race, ethnicity, nationality, language, faith, gender, disability, or sexual orientation, which leads to the inequitable treatment of individuals or groups” (Mitchell & Correa, 1997:84)”.

While South Africa’s new democracy has meant that “the doors of learning shall be opened to all”, (ANC; Freedom Charter) the sight of developments in education is that some institutions are still basking on practices of the past (Eyber, Deyer & Versfeld, 1997: Introduction). Therefore, the programme of anti-discrimination should be intensified in educational institutions so as to harness competencies which were sidelined for a long time. However the paradox with this kind of a programme is that it may revert to discrimination when people are considered for positions or development merely because they belong to a certain group. Therefore, there is a need for careful advancement of certain groups. This requires good judgement from the management to avoid any distinction, exclusion or preference in respect of a particular job based on inherent requirements (Du Plessis et al, 1994:322).

Mitchell & Correa (1997:84) observed the situation in educational institutions and found that discrimination is compounded by race, gender, disability, sexual orientation, age, weight, etc. Discrimination is deeply rooted in culture, tradition or religious beliefs. Discriminatory practices are explicitly reflected in the value assigned to education assigned for girls, delegation of the reproductive role of women and the productive role of men, prescriptions regarding appropriate jobs for women and men, and the perceptions of women as secondary earners and

non-committed members of the work force (Lim, 1996:22; Lundy & Younger, 1994:11; Department of Education, 1997:85-86).

Discrimination disadvantages other groups and if continued it results in:

- unequal hiring standards;
- unequal opportunities for training and retraining;
- unequal pay for equal work, let alone for work of equal value;
- occupational segregation;
- labour status segregation;
- unequal promotion opportunities; and
- unequal vulnerability to retrenchment.

Therefore, the brief of capacity building will be to level the playing fields so that equality for all is achieved.

#### **3.3.4.2 *Equality for all***

The notion of equality is invoked in education as a result of changes effected in education policies so as to resonate with constitutional requirement. Hence Ramphele (1995:6) posits that:

"Equality is non-negotiable with respect to rights of citizens before the law. All citizens ... have to be treated equally".

Although equality is laced with paradoxes and often seem difficult to practice, human resources managers are countenanced to persist in implement it. In the same vein, De Waal, Currie & Erasmus (1999:188) contend that "it is not the basic and abstract idea of equality that is so difficult and controversial", but what is so taxing is determining the similarity of peoples' situation and the treatment of people in a similar situation. With regard to the former notion it can be asked, for

example, if it is possible for a man to be allocated supervision of girls' hostels and a woman to supervise boys' hostels? With regard to latter, it can be argued if it is possible to expose a blind teacher to similar development programmes with normal ones? Answers to these questions leads us to two different types of equality, that is substantive equality and procedural equality.

(i) Substantive quality

Substantive equality refers to a contextual or purposive endeavours to equality. Bray & Maile (1998:8) allude that substantive equality requires examination of the actual social and economic conditions of groups and individuals to determine whether the Constitution's commitment to equality is being upheld. Consequently, one has to consider unique circumstances of persons. Therefore, to realise the ideal of equality in education it may be necessary to differentiate. Hence differentiation in this instance does not constitute discrimination. It is a fair discrimination.

(ii) Procedural equality

Procedural equality is often referred to as formal equality. This form of equality requires that all persons are equal bearers of rights irrespective of the actual social and economic disparities between groups and individuals (Bray & Maile, 1998:8; De Waal et al, 1999:190). Therefore, procedural equality promotes sameness of treatment. The paradox remains. Clearly such treatment may in fact discriminate against persons who are disadvantaged, thus resulting in unfair treatment of and unequal opportunities for them.

### **3.3.4.3 Equity**

What has been noted above is that equal treatment in all cases, especially in our situation where the education system is still reeling from discriminations, also has the potential of reinforcing inequality. On the other hand, equity incorporates both equal treatment and preferential treatment. For instance, women as bearers of children have certain demands made on their time and bodies (Ramphela, 1995:6). Women cannot attend over-extended meetings because they have to look after children and have to breast feed their children. As such, these group of teachers need preferential treatment to allow them to cope with their biological demands. They need flexi-time and flexible career advancement.

Equity also concerns the need to set standards and to reorganise the nature of workplace environments which were previously the exclusive preserve of the advantaged group by ensuring that they support the development of all. For instance, breast-feeding and baby-sitting areas should be created for women, while ramps in educational buildings should be created for the proper functioning of the disabled.

Finally it can be concluded that equality and equity do not prevent education managers from making classifications and from treating some people differently to others. Managers may, therefore, classify people for a variety of legitimate reasons including recognition of competence. Legitimate differentiation is based on identifiable criteria – which is unfair discrimination. In other words, differentiation is permissible if it does not amount to unfair discrimination. Therefore, more differentiation should not deny equal protection or benefit of the law (De Waal et al, 1999:197).

#### **3.3.4.4 Affirmative action**

Affirmative action can be described as a systematic, planned process whereby the effects of racial discrimination are being reversed in all areas of life (Qunta, 1995:1). It provides opportunities not previously available to the disadvantaged groups through proactive programmes. Its antithesis is tokenism whereby members of the previously disadvantaged groups are 'sprinkled in the organisation in visible positions with no role to play. On the contrary, affirmative action is a carefully thought-out strategy, structured in such a way that it maximises the skills and potential for everyone.

Affirmative action is a programme of capacity building which branches out from equality to address the legacies of apartheid in the labour market. In the labour market the disparity in the distribution of jobs, occupations and incomes reveals the effects of discrimination of jobs, occupations and incomes reveals the effects of discrimination against the disadvantaged groups – Blacks, women (Black and White) and people with disabilities. Like it is indicated in section 3.3.4.1, these disparities are entrenched by social practices with perpetual discrimination in employment. These disparities cannot be remedied simply by eliminating discrimination. Policies, programmes and positive action designed to redress the imbalance of the past are therefore critical.

According to Mandela (1991) affirmative action does not entail giving handouts nor privileging skin pigmentation as it was the case in the past. It does not aim to do away with qualifications, and standards in education, but it is premised on justice and equality. Its aims are clearly spot-on in the Employment Equity Act, 1998 as:

- (i) To promote the constitutional right to equality and the exercise of true democracy;
- (ii) To eliminate unfair discrimination in employment;

- (iii) To ensure the implementation of employment equity to redress the effects of discrimination.
- (iv) To achieve a diverse workforce broadly representative of our people; and
- (v) To promote economic development and efficiency in the workforce.

When evaluating the programme of affirmative action, the following criticisms come to the fore:

- It constitutes reverse discrimination.
- It lowers standards as the affirmative action appointees underperform.
- It undermines merit and qualifications.
- It leads to incompetence.
- It increases tension in the workplace.
- It is equal to nepotism and cronyism (Quanta, 1995:17-28).

Despite these criticisms affirmative action is necessary to address the legacies of the past. If practised competently, as it shall be shown in the next chapter, affirmative action may yield positive results especially when it adopts a holistic approach driven by democratic principles, human rights and objectives outlined above.

#### **3.3.4.5 Diversity management**

Broadly speaking diversity management refers to the process whereby organisations with a diverse workforce employ mechanisms to enable everyone to perform at their peak and to contribute their own special skills and expertise. Diversity management does not seek to acculturate the minority or different racial groups into the culture of the dominant group within the organisation, but rather to harmonise the different cultures to the advantage of the organisation (Quanta, 1995:41).

In reality, schools, as organisations, enrol learners from diverse cultures and employ educators from different cultures as well. Therefore, diversity management should be a programme to which schools should pursue to assure quality in education. To ensure effective management of the system, diversity managers are needed to assess the constraints and possibilities of diverse groups in the population in terms of access as well as assessment and quality assurance through the NQF (see chapter for this). According to the Department of Education (1997:204) the education system is obliged to recognise the contribution which men and women with different skills, attitudes, knowledge and cultures can make in improving education quality. It is thus, important to focus on anti-discrimination, equality, equity and affirmative action programmes to meet diverse needs of the system and organisations.

Quality education is attained when friction from cultural and racial stereotyping and conditioning, and from victimisation are reduced. Diversity management aims not to ignore racial, cultural and gender differences but to prevent these from making a section of the workforce unhappy and unproductive, and thus harming the organisation's business. Therefore, diversity management is a programme which complements the others.

### **3.3.5 Capacity building quality contributors**

In the South African context, the commitment to quality education requires capacity building in schools. This entails that managers must seek ways to encourage, identify and develop individual human talent. As schools strive to retain excellent teachers in the classrooms, potential quality assurance mechanisms become critical. Quality embodies widely differing conceptualisations, such as exceptionality, perfection, fitness for purpose, value for money or transformation. According to Fourie & Bitzer (1998:29) an appropriate system of quality assurance must embrace a transformative notion of quality and it should facilitate and ensure a process of continuous quality

improvement. When relating quality to capacity building the following aspects are relevant: accountability, professional capital, well-behaved teachers and nation building. Each will be discussed individually.

### **3.3.5.1 Accountability**

Accountability is a set of commitments, policies and practices that are designed to heighten the probability that good practices will occur for students; reduce the probability that harmful practices will occur; and provide redress and internal self-correctiveness in the system to identify, diagnose, and change courses of action that do not promote good practices for students (Urbanski, 1998:452). In this the South African context (with particular reference to Gauteng Province), accountability in education is necessary in learning sites without a sound culture of learning and teaching. Gauteng Education and Training Council (GETC)(1999:29) probed the culture of learning and teaching and found that it is characterised, in some schools or sites, by:

- declining work ethics, waning self-discipline and social problems which impact negatively on teaching.
- teachers who are not punctual and do not make their own teaching materials.
- teachers who are content with the status quo.

In short, these schools lack in accountability which is founded on elements such as planning, reporting, monitoring, assessment, communication and responsiveness (Kuchapski, 1998:193). The decline in teaching and learning culture is thrown in the deep end of the sea when everybody is not focused and directional. This does not mean that there should be 'policing' in teaching as it was the case in the past whereby school inspectors were bent on witchhunt (The Teacher Organisations Working Committee, 1994:3). The challenge of improving the culture of learning and teaching requires motivational and developmental approaches to accountability because:

"What impedes effective teaching and learning is not that teachers are the problem; it is that teachers work within outmoded, unprofessional systems" (Urbanski, 1998:449).

By taking responsibility for redesigning schools and abandoning unexamined practices and policies, we can restructure the teaching profession in ways that promise more productive teaching. Accountability is a shared responsibility which is driven by the quality of purpose among all the stakeholders. That is to say, all members of the school are driven by common vision (Fourie & Bitzer, 1998:29). The reason why accountability (formerly known as inspection) was rejected was that inspectors did not share a common vision with teachers. Therefore, there is a need to sell one's vision and mission in the first place. Thereafter choose the right and achievable objectives. School managers should be clear on what the institution's plans are; how they are developed and approved; how they are implemented and their effectiveness is assessed; and how they are reviewed and revised in the light of changed circumstances and evaluation of performance. In the same vein, accountability with the purpose of transforming schools democratically should be based on capacity building programmes and those programmes related to empowerment.

These programmes encouraged participative management. The involvement of teachers is necessary because in terms of Ramusi (1998:7)

"Teachers in particular are not content to be mere followers of top-down instructions but want to be involved in decision-making processes. They are people with current feelings and desires, who feel excluded or undervalued if their views are silenced or ignored".

Therefore, accountability should be premised on democratic management to minimise resistance, and effect change smoothly. The fruits of accountability are wide ranging and can be summarised as a sound culture of teaching and learning.

### **3.3.5.2 Building professional capital**

The decline in the culture of teaching and learning has been accompanied by many teachers losing a sense of the distinctive kind of service they should be offering in schools, to a serious impoverishment of the understanding of the constituting responsibilities of teachers (Morrow, 1994:28).

Although many teachers have been trying harder to discover or rediscover their responsibilities, their intentions are confounded by the immensity of the problem. As individuals they cannot succeed, and many have given up to fulfil their responsibilities. There is a need for collective action. However, collectivism should be complemented by a fundamental shift in attitudes, in the way teachers relate to each other and their environment, and in the way resources are deployed to achieve equity and growth.

There is a need to articulate and operationalise the work ethic (Sibson, 1994:28). This entails that the set of views, values, attitudes and norms that induces teachers to do their best at work should be transformed. Hence, Mokaba (1998:17) argues that deploying human capital is not enough. Professional capital is a precondition for capacity building. Professional capital includes things like honesty, trustworthiness, dedication and determination. The education system cannot afford a situation whereby:

"everybody is bent on trying to cheat everybody else, everybody steals whatever they can wherever they can" (Mokaba, 1998:17).

No matter how huge resources are made available, as long as the professional capital is lacking no sound teaching and learning culture can be built. If teachers disregard timetables, absent themselves without reasons, and learners dodge lessons, cheat in examinations, officials inflate or deflate date (as it was the case in Mpumalanga) our education system will crumble. Therefore, professional

capital is needed across the board (Van Rensburg, 1994:5; Morrow, 1994:28 and Venter, 1997:241).

The absence of professional capital in teachers rages the debate on whether teaching is a profession or not (Badenhorst & Scheepers, 1995:68). There is no code of ethics, teachers are often not familiar to new methods and techniques and their participation in educational research is often at a low level. The report by the GETC (1999) bears testimony to this arguments. What is missing is:

- the provision of quality service to other people;
- specialised current knowledge;
- the right to manage own affairs; and
- a code of ethics.

If these requirements are met then teaching will become a profession. However, with the promulgation of the Employment of Educators Act, 1998 teaching is moving towards professionalism because the Act entrenches and envisages a professional organ that will regulate teaching – the South African Council for Educators (SACE). Thus, these changes mark a new era in teaching whereby standards and norms will be regulated, teachers' conduct will be monitored, etc.

### **3.3.5.3 *Managing teachers' behaviour***

Managing behaviour can be a bit of a problem. The main way people judge others is observing their behaviour and coming to conclusions. Such approach is somewhat akin to judging the extent of an iceberg by its tip. Keetan (1996:5) avers that 90% of behaviour (its structure) is hidden beneath the surface. No one knows exactly what is lurking in the ocean depths. The behaviour that is worth managing for capacity building is the problem behaviour. When people are behaving well, there is no necessity to explore the reasons for their behaviour. But when they are not, it becomes critical to manage them. This is not to

suggest that managers must become fathers and mothers to teachers, but they should be aware of the extent of the teacher's problem behaviour and introduce management strategies that will remedy or improve the teacher's circumstances. Managers need to observe behaviour objectively, must not confuse personality with behaviour and must circumvent misinterpretations of the teacher's actions.

In that note it can be concluded that if managers make effort to understand behaviour, they will find it very much easier to manage their own organisations and get on better with teachers. Knowing more about the origins of behaviour allows the manager to understand that when teachers do not behave like themselves there is probably a very good reason, and that when they do not behave like them, they are simply behaving like themselves. [Refer to paragraph 2.5.2.1(d) for more details].

#### **3.3.5.4 *Education for nation building***

The transformation discourse in the South African education system has set education on the course of nation building. The imperative of capacity building invokes nation building in education. According to Higgs (1998:41) nation building is a strategy used to create unity from diversity. Support for a process of education for nation building is based on the contention that, in order to deal with the problem of reconciling cultural diversity with national unity, there needs to be committed to the development of a sense nationalism, as well as a common culture committed to nation building.

In this project it is argued that the recognition of competence with the element of transformation, represents an empowerment programme which is driven by a sense of utility (see the orientation paragraph of section 3.3.4 of this chapter). That is to say, education should be made to serve the needs of the state and the economy. Hence it is mentioned in the previous sections that education should be concerned primarily with the self-empowerment of an individual person which

will permeate needs of the state policy and the vocational interests of commerce and industry.

### **3.4 CONCLUSION**

In this chapter I have outlined how the current emphasis on competencies in advancing South Africa to new trends in world markets begins with empowerment and capacity building in education. With regard to empowerment I have discussed the shift in paradigms of managing schools and individual teachers. It has become evident that the transfer of power from education managers to teachers is done to the benefit of both. However, each model or approach discussed reflected advantages and disadvantages. Nevertheless the quality of education can be maintained if empowerment is regarded as a continuous process not a "once-off" issue. People need to be constantly refining and improving their skills, knowledge and attitudes.

The development of teachers' skills, knowledge and attitudes takes place in a particular setting. Realising that the legacy of apartheid may confound our efforts in improving education, capacity building is pursued to level the 'playing fields'. That is to say that, an enabling environment is created to empower individuals to perform at their peak.

When put together, empowerment and capacity building seem to be a model that is geared towards recognition of competence. Recognition of competence, as expressed in empowerment and capacity building, is concerned with values that sustain the teaching professional world by seeking to promote self-development which will enable individuals to cope with technical, intellectual and professional dynamics as well as with transformation challenges. Therefore, recognition of competence seems to be a relevant model for human resources management in South Africa currently.

## CHAPTER FOUR

### 4. METHOD OF INVESTIGATION

#### 4.1 INTRODUCTION

In the preceding chapters the researcher outlined, through a literature review, constructs and maxims that are fundamental to the recognition of competence. Although a literature review reveals that the South African education system is engaged in a move towards competence education, there is still a need to ascertain whether such policy initiatives have filtered through to the point of practice – that is the schools. As such the purpose of this chapter is to determine, through empirical research, the extent to which benefits and progress asserted by individual writers, including government departments' reports, are valid and real and point out areas for further development.

Therefore, this chapter will focus on an empirical research which is a form of research that involves asking a large group of people questions about a particular topic or issue (Neuman, 1997:229). Thus, this is not a diametrical shift away from theories, models, presuppositions and predispositions discussed in the preceding chapters. But the empirical research is undertaken in order to:

- prove the theoretical foundations of the theories discussed in the previous chapters;
- to get the real 'feel' of the situation; and
- to investigate the extent of the problem.

Therefore, the empirical research will complement the literature review. This method does not castigate previous theories but builds upon them. Neither does the empirical research attempt to duplicate the frontiers of knowledge reached in the previous chapters. This approach is premised on the idea that

"Until you have learned what others have done in your area, you cannot develop a research project that will contribute to furthering knowledge in your field" (Johnson, 1994:186).

Thus, literature review forms the foundation on which empirical research should be built.

## **4.2 METHODOLOGICAL CONSIDERATIONS**

The following research methods have been used by the researcher:

### **4.2.1 Literature study**

Continuing from the above maxims, one can say that a literature review is critical to research because it contributes a set of interrelated constructs (concepts), definitions, and propositions that presents a systematic view of phenomena by specifying relations among variables, with the purpose of explaining and predicting the phenomena. For instance, it was possible for the researcher to establish the relationship among recognition of competence, empowerment, capacity building and retention. Therefore, the literature study provides a sound knowledge base

- to systematise and summarise the existing knowledge;
- to assess the validity, internal consistency, assumptions and implications of the empirical findings;
- to provide a provisional explanation for observed events and relationships; and
- for the stimulation of the generation of a new knowledge base by providing clues for further research (Garbers, 1996:280).

The review of literature is helpful in the interpretation and analysis of data collected by allowing the researcher to see how he or she deviates from what has already been done. In this way it allows the empirical research to advance, refine, revise and develop existing theories or models. Johnson (1994:186) identifies the benefits of a literature study as:

- delimiting the research problem;
- seeking new approaches;
- avoiding sterile approaches;
- gaining insights into research methods; and
- helping in developing and inventing tentative solutions to problems.

Therefore, it was for this reason that a literature study was undertaken. And this sense of purpose has driven the researcher to use a survey.

#### **4.2.2 The survey method**

Likewise, a survey is a useful approach in empirical investigation because it helps the researcher to look at a phenomenon in a real life situation and is a way of precluding one's own preconceived ideas to cloak, obfuscate or obscure what one aims arriving at (Du Plooy & Killian, 1990:30). This is possible because a survey is usually representative and independent of a specific context (Garbers, 1996:288).

A survey is an objective method, although having its own limitations that increases the likelihood that the researcher will make rational judgements and decisions concerning recognition of competence. It provides a powerful source of evidence (Garbers, 1996:30).

### **4.3 AIMS**

In Chapter One the general aim of this project were identified as an investigation of human resources management (HRM) aspects that influence the quality of service in public education. Secondly, to identify measures that can assist teachers to realise their full potential and enhance their professional development and career planning. And thirdly, to help analyse ways and means of ensuring that rewards, empowerment and capacity building match the teachers' needs and those of their schools.

### **4.4 TARGET GROUP FOR THE INVESTIGATION**

The study involves principals, deputy principals, HOD's and all teachers in both primary and secondary schools of the Southern Region of the Northern Province of the Republic of South Africa. It was decided to involve all these groups because the quality of service depends on all of them. No single individual can restore and maintain quality service (teaching) (Lethoko, 1999:46). Each teacher's performance is influenced by several factors including the way teachers are rewarded even by principals, deputies or HODs. Therefore, it was an imperative to include all these groups of respondents in the survey.

### **4.5 RESEARCH METHOD**

#### **4.5.1 Questionnaire as a method of research**

##### **4.5.1.1 Questionnaire construction**

The nature of this study has compelled the researcher to focus on management staff of schools because they are in a day-to-day contact with the nitty-gritty of teachers' competence, rewards and the performance of teachers in general. The researcher developed questionnaire items from sources such as:

- Literature study (books, journals, dissertations and theses)
- The researcher's experience as an education manager.

The questionnaire was constructed in such a way that the respondents select an answer from a list of answers provided. The questionnaire was drafted in such a way that the respondent's identity (in form of name, address or telephone number) was not required. However, data regarding gender, age, post held and type of school was needed for the purposes of analysis but not identification. Learners were not considered for this research.

It was important to draft the questionnaire in such a way that it helps school managers to identify the level of competence, empowerment and capacity building in their organisations and determine how competence, empowerment and capacity building are related to other organisational variables such as perceived job characteristics, job satisfaction and intentions to quit. The questionnaire attempted to address several important issues on measuring attitudes, such as constructs and observable indicators, reliability and validity.

(i) Constructs and observable indicators

A construct is a theoretical construction about the nature of human behaviour. Personality characteristics (such as anxiety and self-esteem), management styles (such as consideration of subordinates and initiating structure) and job attitudes (such as job satisfaction and social support at work) are examples of constructs addressed in the questionnaire. The researcher hopes that the constructs will help education managers understand teachers' behaviour such as their enhanced authority to act such as when quality standards are compromised.

(ii) Reliability

According to Hayes (2000:48) reliability is the degree to which measurements are free from random errors. Reliability can be thought of as the relationship between the true underlying score and the observable score. Random error decreases the measurement's reliability; that is, as random error is introduced into measurements, the observed score is not a good reflection of the true underlying score. For the researcher to feel confident that a questionnaire's

scores accurately reflect the underlying dimension, the questionnaire must have high reliability.

(iii) Validity

Validity refers to the degree to which the evidence supports the inferences made from the scores derived from measurements or the degree to which the scale measures what it is designed to measure. Unlike reliability, there is no single statistic that provides an overall index of the validity of inferences about the scores.

In the same vein, the researcher developed the attitude survey according to the following steps:

- (a) Defining the construct to be measured. This was done by using words or other constructs. Basically, the construct is defined in the way that words are defined in the dictionary.
- (b) Generating items to measure the constructs. These items which act as observable indicators bring the construct into the observable world by specifying how it can be measured. Items were generated through the literature review, consultations with the supervisor and personal experiences. The number of items needed to measure a construct were limited for convenience and respondent's friendliness, and varies from one construct to the other.
- (c) Evaluating the items. The quality of items generated in step two was evaluated. This is what the researcher referred to as a pilot study. The generated items were compiled into a trial questionnaire which was given to a sample of respondents being a representative sample of the population for which the questionnaire is targeted. For example in this project school management teams in both primary and secondary were targeted.

**PART A** dealt with biographical data which included aspects such as gender, age, experience, type of school, position held, highest qualification and field of specialisation. These data was required because of their influence on the respondent's responses.

**PART B** dealt with recognition of competence. The researcher wanted to determine the challenges that teachers and management encounter in schools.

The following scale was used

Agree	1
Neutral	2
Disagree	3

on reasons for entering teaching, commitment to teaching as a lifelong career, factors that offer teachers prospects of career orientation, threats to teaching, and possible reasons for leaving teaching. In addition, the researcher used the following scale

Highly satisfactory	1
Satisfactory	2
Uncertain / do not know	3
Not satisfactory	4
Highly unsatisfactory	5

This scale was used on aspects such as reward and compensation and reasons why teachers seek promotion. Furthermore, the researcher used the scale such as:

Very often	1
Rarely	2
Seldom	3
Never	4

to determine teachers' career contingency factors.

**PART C** dealt with empowerment. The researcher used the following scale

Agree	1
Disagree	2

to find out about teachers' attitudes about the prevailing situation in their schools, and how they cope with changes occurring in education. The researcher went further to use the scale such as

Always	1
Often	2
Seldom	3
Never	4

to enquire on empowering school management models, teams, partnerships and networks. And finally, the researcher used the scale such as

Believe	1
Disbelieve	2

to determine excellence in teaching. Statements included in this category ranged from issues including extracurricular activities to academic life of the school.

An attempt was made to ensure the accuracy of the statements included in the questionnaire. Several drafts were made and discussed with the supervisor and the research support division of the University of Pretoria. In consideration of their suggestions the initial drafts were changed until the final draft was accepted by all of them. Accuracy in eliciting information was ensured in the construction of the questionnaire by looking into all aspects of education management that impact on recognition of competence, empowerment and capacity building as well as the retention of excellent teachers. A pilot survey was conducted to evaluate the clarity of the items included in the questionnaire. Two primary schools and two secondary schools' management teams were used to evaluate the questionnaire items. The management staff members of these schools

responded to the questionnaire and did not experience any problems. All the items were clear to the respondents. As such, no alterations were made to the final draft. Finally, the questionnaires were distributed to – both primary and secondary schools in the Southern Region of the Northern Province of the RSA.

#### **4.5.1.2 Structured questionnaire**

The researcher opted for a structured questionnaire because it proves to be more practical and effective. Its advantages are:

- Data is easily collected and many respondents can be reached.
- Standardised instructions can be given so that respondents know exactly what is expected of them.
- A questionnaire is cheap and does not require educated personnel to help fill it in and is relatively easy to administer.
- A more objective opinion can be given when the questioner is not present.
- With a well-planned, neat, and good questionnaire, the co-operation of people becomes easy (Smith, 1983:165).

However, a structured questionnaire is not without disadvantages and limitations. Smith (1983:168) identifies the following as disadvantages of a structured questionnaire:

- Lack of individual understanding. The possibility of repeating questions as the respondent does not understand the question from the outset.
- Low response rate.
- Many questions are not answered.
- No control of external influential factors.
- Questionnaires delivered personally are a financial burden.
- Respondent(s) hide or run away when one comes back to collect the questionnaire.
- Respondent(s) complain of not finding enough time to complete the questionnaire, and some are unwilling to comply.

#### **4.5.1.3 The self-administered questionnaire**

The researcher undertook to distribute questionnaires all by himself and collected them as well. The above hiccups were experienced. However, the structured questionnaire is found to be the best method to motivate respondents and convince them that the study is worthy and valid. This was done on the accompanying letter. As such, a self-administered approach was adopted. Each respondent received a printed questionnaire and completed it by using a pen or pencil. In some cases, the researcher was present when the questionnaires were filled in. Therefore, two types of self-administration were followed.

##### **(a) Supervised administration**

With regard to the supervised administration, the researcher took the following steps in administering the questionnaire:

- Respondents were identified, called into one location and were given questionnaires.
- Each respondent completed the questionnaire individually.
- The researcher was always available to provide introductory instructions, answer questions and monitor the extent to which the questionnaires were completed.

##### **(b) Unsupervised administration**

Due to time constraints some questionnaires were distributed and left with the principals. According to Ely, Anzu, Friedman, Garner & Steinmetz, (1991:130) this represents an unsupervised administration of questionnaires. The evaluation of this type of administration (self-administration) reveals advantages and disadvantages. The advantages are:

- The researcher has an opportunity to learn about a set of characteristics, attitudes or beliefs of the sample population.
- Cost: Self-administering questionnaires is cost-effective in the sense that the researcher goes to one school once and never again, there is no need for a follow-up in most cases.
- The researcher is not available to answer questions.
- The researcher can monitor communication between respondents.
- The researcher can monitor completion of the questionnaire appropriately and timeously.
- There is a considerable degree of response rate – people are more likely to respond at a given time.

The disadvantages are:

- It can be a very expensive exercise as it includes a lot of travelling from one place to another on a daily basis.
- For some topics on complex issues, some people might feel more uncomfortable in the absence of the researcher.
- Some people feel obliged to paint a favourable picture of their school or principal. (King, Keohane & Verba, 1994:90).
- The researcher applied for study leave to conduct the research. Thus, the use of mail or postal questionnaires was not explored, but instead self-administration was used to expedite the process and save time. The researcher's presence helped to clarify some questions and doubts, and some respondents had to be assured of anonymity. Therefore the self-administered (supervised) questionnaire was the best option for the researcher.

## 4.5.2 Interviews

An interview is a face-to-face confrontation, it is an oral exchange between an interviewer and an individual or a group of individuals. The researcher has chosen this method of research because of the following reasons as concurred by Fraenkel & Wallen (1993:385):

- (i) it is an important way for the researcher to check the accuracy of, to verify or refute the impressions he or she has gained through observation.
- (ii) to find out what is on the mind of the interviewees – what they think and feel about something (teacher retention in this regard).
- (iii) to find out from people those things that one cannot directly observe.

### 4.5.2.1 *Informal interviews*

Not derogating from the other types of interviews such as structured, semi-structured and retrospective, the researcher has chosen informal interviews which were conducted during the research. This type of interview is sometimes called "an open-ended conversation interview". (Anderson, Herr & Hihlen, 1994:115).

Informal interviews have the following characteristics:

- they are much less formal than structured and semi-structured interviews;
- they tend to resemble casual conversations, pursuing the interest of both the researcher and the respondent in return;
- they do not involve any specific type or sequence of questions or any particular form of questioning;
- the primary intent of an informal interview is to find out what other people think and how the views of one individual compare with those of another;
- they offer the most natural situation for the collection of data; and
- they are the most common types of interview in qualitative research (Fraenkel & Wallen, 1993:385).

The researcher held some informal conversations with principals, deputy principals, head(s) of department and senior teachers on issues relating to recognition of competence, empowerment and capacity building as well as retention of teachers. The report of the responses will be provided later in this chapter. The readers should note that like any other research technique, informal interviews have advantages and disadvantages.

#### **4.5.2.2 Advantages of informal interviews**

- (i) As an open situation, informal interviews have greater flexibility and freedom.
- (ii) Extensive opportunities for response.
- (iii) Offer possible opportunities for probing.
- (iv) The rate of return is very good.
- (v) They are a good tool to use when one wishes to know how a person feels about events.
- (vi) They help the research to gain perspective on how others understand and interpret their reality (Anderson, et al, 1994:115; Cohen, et al, 1980:244).

However, the interviewer plays a key role in determining the sequence and wording of the questions asked (see appendix 2). Hence, the researcher has planned this interview in such a way that the purpose or aim of this project is clearly reflected. For instance, in this interview, the researcher focused on:

- Communication
- Rewards
- Appointments
- Redeployment and job security
- Provision and supply of resources
- Academic background
- Leadership style
- Parental involvement
- Teachers' morale
- Policy documents

- Learner representation

While the above were possibilities enjoyed by the researcher during the interview on the one hand, on the other hand, the researcher experienced certain limitations such as those mentioned below.

#### 4.5.2.3 *Disadvantages of informal interviews*

- Sometimes it is difficult to compile a good list of sequential questions.
- Some people do not answer questions honestly and therefore skew the data.
- Lack of anonymity as the interviewer can see the interviewee (Anderson, et al 1994:114).

#### 4.6 REPORT ON INFORMAL INTERVIEWS

The researcher visited 116 schools within the Southern Region of the Northern Province. In that visit the researcher managed to interview principals, deputy principals in the absence of principals and heads of departments. Teachers and learners were not interviewed except where a teacher was acting in a management position. In some cases teachers were nominated into management portfolios, as part of local arrangement to "beef up" the management team of the school. Such teachers were interviewed as well.

	Primary Schools	Secondary Schools	Total
Interviews	62	54	116
Survey	107	68	175
Questionnaires distributed	178	92	270
Questionnaires returned	112	65	177
% of questionnaires returned	62,92%	70,65%	65,55%

The researcher interviewed and undertook a survey in some cases – while in others only interviews were conducted or a survey was conducted. The total number of schools where both interviews and surveys were undertaken were 89 – (48 primary schools and 41 secondary schools). Therefore, the 116 total of schools used for interviews is inclusive of the 89 and the 175 also includes the 89. Consequently, 27 schools were interviewed without conducting the survey and 86 schools were used for the survey only.

#### **4.6.1 Opinions of heads of department**

In most schools heads of department (HOD) cited lack of academic background in education management as the main cause of the poor management in schools. They are of the opinion that principals use conventional knowledge to run schools, and thrown into the deep end of the sea because there are insufficient programmes to develop them. In such cases such principals derived personal satisfaction from autocracy thereby stifling human relations among staff. Consequently, the staff component of such schools is divided and group rivalry is common. Those who cannot cope, frequently absent themselves from school with the excuse of attending meetings in the circuit or going to submit departmental documents to the circuit. HOD's posit that principals have lost moral authority, hence the crisis in schools-teachers are not punctual, abscond from lessons, learners dodge classes and truancy and ill discipline are the order of the day.

However, most HOD's are positive about the fact that the situation may improve in some schools if parental involvement can be enhanced. They see the role of school governing bodies (SGB's) as watchdogs. They are of the opinion that the Department of Education should not disregard SGBs. They lament the fact that in some cases parents are exploited because they (parents) are convinced that because they are uneducated they are therefore of less use in the discussions and debates on school matters. On this issue most HOD's conclude that there is a need for development programmes for SGBs if their contributions are to exert more weight. One reason why progress in education is impeded so much is the attitude some teachers have about parents. Some HOD's cite the fact that

teachers think that parents should not interfere with classroom matters because they are not professionals. With most SGB members being illiterate they dare not confront teaching problems, which exist in their schools.

Furthermore, the HOD's are of the opinion that teachers morale have declined substantially because of:

- Cynical criticism from the media and department officials;
- No rewards or praise but accusations;
- Inadequate and late supply of books and stationary;
- Overloaded (In fact in extreme cases one or two teachers were facing schools with all grades – usually in primary schools);
- Shortage of staff;
- Lack of classrooms, laboratories, offices and library buildings;
- Poor working conditions in terms of salaries and other benefits; and
- Political influence on teachers.

Most HOD's point a finger at the provincialisation of education. According to them provincialisation of education has led to a plethora of different provisioning systems. The process of procurement and supply of resources like books has become complex. It takes long to get books. For instance, the process starts with selection which is devolved to schools, the selection is sent to the Circuit office, the Circuit then supply the Area office with inventories which are sent to the regional office. The whole process is slow. The continuum is further extended by the tender system which include:

- Paper manufacturers
- Paper suppliers
- Printers
- Publishers
- Booksellers

Any delay or problem between any of the players has a domino effect to hold up work later down the line. Whilst there are problems at provincial level, districts and regional offices are affected. Hence schools encounter problems such as non-return of books at the end of the year, inadequate storage facilities, inadequate stock management and retrieval systems, incorrect book requisitioning, unwise spending and vandalism.

In addition the HOD's are of the opinion that the low ebb of performance in teachers is exacerbated by the "loss of job security". They posit that redeployment has affected teachers' performance tremendously. Teachers are uncertain about their future. Another difficulty which HOD's have to grapple with daily is the misuse of the recognition given to learner representative councils (LRCs). They are of the opinion that while LRCs are an integral part of school governance and management, certain elements of this structure are bent on destabilising schools. They demand farewells at an exorbitant amount and cause strikes in schools.

The HOD's are also critical of the discrepancies that exist in policy documents that are aimed at transforming schools. For instance they were critical of the fact that ELRC collective agreement on the job description of teachers does not give a definitive clue on hours of work. This creates tension between the school management and teachers. There exists a difference on the interpretation of these agreements. This problem is aggravated by trade unions who report differently. The opinions of HOD's are not different from those of principals or deputy principals.

#### **4.6.2 Opinions of principals or deputy principals**

In some schools principals complain of poor communication between them and the department of education. For instance, they complain that some circulars do not reach them early. They either receive circulars on the day of submission or day(s) after due dates. In some cases the unions report to their members on particular issues. Teachers hear of certain things before them and this creates discrepancies when they have to report later. Usually this happen to schools

which are not accessible as a result of poor roads and lack of telephones. They report that what worsens their predicament is reports from the radio which speak of "fresh changes" while they have 'old' circulars. This leaves them in a dilemma. They do not know which one to believe.

They complain about the fact that many teachers are burnt out. If opportunities can be there most teachers may opt out of the system – hence voluntary severance packages were placed on a moratorium. Most principals believe that the situation is aggravated by insufficient rewards. This happened when annual increments were reviewed. Most of the teachers do not understand what happened to their salaries.

In most schools that I visited principals were complaining that there is no longer appointments in a full time capacity in management positions. Those who were appointed were to act. Acting to them creates several problems, among others:

- one's vision is shortened – one can only think of short term policies not long term ones;
- there is no continuity;
- one is unsure of the future;
- a sterile environment is created with schools continuing with business as usual even if there is a dire need for change; and
- acting managers are not respected because they are thought to be 'sojourners' in their posts.

In the same vein, most principals are of the opinion that redeployment causes havoc. There has been a long delay in this strategy – which many see as effective retrenchment rather than the large scale reshuffling of teachers to needy areas. They regard the process as slicing a path of destruction through schools, ridding them of their most valuable staff members, affecting academic achievement and causing depression, anxiety and poor performance among teachers.



Principal after principal spoke strongly against redeployment – which they believe has been poorly managed and they fear that it will backfire soon. Many principals have spent months locked in paperwork battles with department officials in a bid to save their classrooms from being left without teachers. Personal tensions are increasing because of the workload. Most schools are left with no option but to hire their own personnel via their school governing bodies. With this approach principals also complain that although it will make the much needed teachers available, those teachers have fewer benefits and are sometimes paid less than their state-employed colleagues. Sometimes the disaster is that poor performing long-serving teachers retain their jobs at the expense of excellent teachers. This usually happens in the fields of Natural Sciences and Mathematics.

Redeployment affects the job security of teachers according to most principals. Teachers don't know whether they will still be employed tomorrow. They say that most affected teachers feel used and abandoned and are resentful of their conditions. They can't plan ahead because they are constantly thinking that not after long they will be out of the system and their jobs.

Most principals complain that they are not given the right to interview teachers on the redeployment list. They complain that although the department has held several formal and informal meetings with all stakeholders to streamline its policies, aims, objectives and activities, there still remain problems with regard to this process.

The principals also lament of the political climate created by the new democracy by allowing trade unionism among teachers. In line with the open-door policy of the Department to give organisations and individuals freedom to air their views and grievances, the Department treated the marches, sit-ins, pickets and even strikes by teachers as part of the educationally accepted processes of communication and consultation. Many older generation of principals felt threatened by young teachers who had relatively good paper qualifications and were committed to ideas of democracy and social change. Some of these younger generation of teachers often confuse education as a political turf where

one's political yearnings can be realised. They see the principal's role of communicating with the Department as a blacklist and 'selling out'. As a result many of these teachers would use what is available to discourage or even threaten principals. They did most of their activities in the name of unions to counter authority and accountability. Hence, it is common to hear of principals ousted. The whole of the accountability system has fallen down. Some teachers prevented principals and HOD's from entering classrooms for any purpose whatsoever. However, these practices did not occur in all schools. Nevertheless, the crisis is widespread and enormous. The hard reality is that these labour activities contribute to the decline in teaching and learning. Most principals cite the fact that it is a problem to control the entire school when teachers have gone to union meetings, marches and strikes. Learners do not easily return to schools after strikes. In addition, principals complain of issues identified by HOD's as contributors to teachers' low morale.

Another problem identified by principals is the lack of parental involvement. They mention the fact that because most of the members of the SGBs are illiterate there is limited participation in decision-making and management. Principals say that this creates negative perceptions of the SGBs who are criticised as being rubber-stamps of principals, management stooges and puppets who are manipulated by the principal. Ultimately the governance structure of the schools is rendered unfunctional. The role of the SGB should be clearly defined. Equally, the role of the LRC should be spelt out to curb the abuse of powers given to student leaders. These leaders do not co-operate with principals and are bent on a destructive course. For instance, in some secondary schools the LRC have been accused of inciting students to strike in demanding a farewell function, whereas the little money available was used to buy rudimentary materials desperately needed for teaching and learning.

Principals are of the opinion that more in-service development programmes should be conducted first for the management team and teachers later to enhance their capacity of management, and support should be readily available for all stakeholders.

## **4.7 FINDINGS FROM THE SURVEY**

### **4.7.1 Introduction**

Data in this section was derived from the views of principals, deputy principals and heads of department as well as senior teachers, who are nominated locally by the school governing bodies (SGBs) to beef up the management team, in both primary and secondary schools. The data which are presented was completed by representative samples of respondents from the Southern Region of the Northern Province of the RSA.

The researcher has drawn in the services of the University of Pretoria's statistician in the Department of Research Support and Statistics/Information Technology. This crucial resource was used for the analysis of data.

### **4.7.2 Coding and scoring**

The researcher extracted data and converted it into scores to enable the computer to do a fast grouping of similar responses. This process is called scoring or coding. The data was checked for correctness, all items were correct except for the fact that some frequencies were missing. This was caused by the fact that some respondents did not respond to some questions. However, in general, there were responses to all questions.

In the presentation, analysis and interpretation of the results, the research will not deal with all the items in the questionnaire but will select the most important parts (questions).

### 4.7.3 Presentation, analysis and interpretation of the results

#### (a) Biographical data

**Table 4.1: Biographical and educational data**

<b>V3 Gender</b>	<b>Frequency (f)</b>	<b>Percentage (%)</b>
Male	87	50,0
Female	84	49,1
Totals	171	100
<b>V4 Age (in years)</b>	<b>Frequency (f)</b>	<b>Percentage (%)</b>
20 – 29	8	4,6
30 –39	89	50,9
40 – 49	61	34,9
50 – 59	17	9,7
Totals	175	100
<b>V6 Type of school</b>	<b>Frequency (f)</b>	<b>Percentage (%)</b>
Primary	107	61,1
Secondary	68	38,9
Totals	175	100
<b>V9 Highest qualification</b>	<b>Frequency (f)</b>	<b>Percentage (%)</b>
2 years education diploma	26	14,8
3 to 4 years diploma	85	48,3
B degree (3 to 4 years)	15	8,5
B degree and diploma	31	17,6
Honours degree	11	6,3
Other qualification	8	4,5
Totals	176	100
<b>V10 Field of specialisation</b>	<b>Frequency (f)</b>	<b>Percentage (%)</b>
Management	31	19,5



Science	21	13,2
Mathematics	24	15,1
Technology	4	2,5
Commerce	9	5,7
Humanities	46	28,9
Other field	24	15,1
Totals	159	100
<b>V13 Geographical area</b>	<b>Frequency (f)</b>	<b>Percentage (%)</b>
In a township	17	9,7
In an informal settlement	2	1,1
On a farm	1	0,6
In a rural village	156	88,6
Totals	176	100

#### **Analysis and interpretation of data**

Data contained in table 4.1 reveal certain aspects of the situation in education. For instance, it can be said that there is probably an improvement in gender equality. 50,9% of the respondents were males while women constituted 49,1%. The fact that this study targeted school management teams – principals, heads of departments and deputy principals, means that there appears to be an effort to advance women in the management of schools. However, this endeavour should be accelerated to meet the target of 51 percent because females constitute more than 50% of the population. On the whole, a glaring discrepancy crops up when one considers responses in V7 (as shown in the table below).

**(b) Current position**

**Table 4.2: Present position**

V7 Present position	Frequency (f)	Percentage (%)
Principal	27	15,4
Deputy Principal	7	4,0
Head of Department	35	20,0
Teacher	106	60,6
Totals	175	100

**Analysis and interpretation of data**

To clarify this, one needs to refer to Chapter four of the report on informal interviews and the target group. To recapitulate from the report on informal interviews, it was found that most members of the management team were appointed in an acting capacity or are local appointees by the Circuit/SGB. This group waits for approval from the department. Hence the highest number of respondents were teachers – 60,6%. There is a probability that very few women are managers, while men are still in the majority. This should be viewed in the light of the fact that more respondents appears to be from primary schools (see table 4.1 on biographical data). Therefore, there is a possibility that more women managers – principals, deputy principals or heads of department may be concentrated in primary schools. The table below attempts to clarify this.



This argument is substantiated by the above table. With regard to principals, an adjusted residual is used. For instance,

$$\begin{aligned} \text{Males } fe &= \frac{fe \cdot fr}{N} \\ &= \frac{86.25}{169} \\ &= 12,7 \text{ males} \end{aligned}$$

$$\begin{aligned} \text{Females } fe &= \frac{fc \cdot fr}{N} \\ &= \frac{83.25}{169} \\ &= 12,3 \text{ females} \end{aligned}$$

The standardised residual is

$$R = \frac{fo - fe}{\sqrt{fe}}$$

If  $R = 72,00$  and is positive, then the number of observations in that cell is greater than would be expected due to chance only (males principals). If  $R = 72$  and is negative, then the number of observations in that cell is lower than would be expected due to chance only (female principals). Therefore, the percentage of

female principals is not statistically significant and that of males is significant according to the standardised residual.

**Table 4.2 Gender\* Present position Cross-tabulation**

		Present position				Total
		*Principal	Deputy	HOD	Teacher	
Gender	<u>Male:</u>					
	Count	18	4	14	50	86
	Expected Count	12.7	3.6	17.8	51.9	86.0
	% within Gender	20.9%	4.7%	16.3%	58.1%	100.0%
	% within Present position	72.0%	57.1%	40.0	49.0%	50.9%
	Adjusted Residual	2.3	.3	-1.4	-.6	
	<u>Female:</u>					
	Count	7	3	21	52	83
	Expected Count	12.3	3.4	17.2	50.1	83.0
	% within Gender	8.4%	3.6%	25.3%	62.7%	100.0%
	% within Present position	28.0%	42.9%	60.0%	51.0%	49.1%
	Adjusted Residual	-2.3	-.3	1.4%	.6	
Total	Count	25	7	35	102	169
	Expected Count	25.0	7.0	35.0	102.0	169.0
	% within Gender	14.8%	4.1%	20,7		
	% within Present position				60.4%	100.0%
		100.0%	100.0%	100.0%	100.0%	100.0%

The cross-tabulation above reveals that most males appear to be occupying management positions in schools. For instance, 50,9% of the respondents were males, while women constituted 49,1%. This data should be interpreted in the light of sections 2.5.1.1.7 and 3.3.3.3. It appears that women still occupy lower posts although they are in the majority in teaching and in the population. Seemingly, this practice might have emanated from the perceptions of the society at large. Furthermore, South Africa is a patriarchal society, which means that women are given a chance to take leadership positions in their career. The perceptions are deeply rooted in rural areas.

It appears the Department of Education in the Northern Province is not managing its human resources effectively. There are many local appointees (either acting and waiting for official appointment or appointed by the SGB to complement the management team of the school).

**(c) Field of specialisation**

The data contained in table 4.1 reveal that most members of the school management teams have specialised in humanities - 28,9%. Only 19,5% constitute those who have qualifications with specialisation in management. Very few are qualified in technology and commerce. When viewed in the light of V9 (highest qualification) a disturbing possibility emerges. According to table 4.1 the greatest percentage of respondents namely 48,3% only possess a 3 to 4 year diploma. The probability that some of the principals will fall in this group is thus relatively high and many managers may be academically poorly equipped to perform their task. However, it appears as if 95,7% of the respondents claim to have between 1 to 20 years of experience. Some of the managers may thus be relatively experienced in respect of their particular task.

**(d) Geographical area**

**Table 4.4: Geographical area (V13)**

<b>V13 Geographical area</b>	<b>Frequency (f)</b>	<b>Percentage (%)</b>
In a township	17	9,7
In an informal settlement	2	1,1
On a farm	1	0,6
In a rural village	156	88,6
Total	176	100

**Analysis and interpretation of data**

Table 4.4 clearly shows that most of the schools that participated are situated in rural areas (88,6%). Only 9,7% of schools that participated are located in townships. There are few schools in an informal settlement (1,1%) and on farms (0,6%): When considering the revelations made in Chapter three regarding the conditions and provisions of resources, one could possibly conclude that there is an acute shortage of resources (90%). The inadequate supply of furniture is estimated at 54%; and insufficient classrooms (41,58%) (HSRC, 1998:15). These statistics given by the HSRC and those from this research confirm that there is still a great deal to be done in rural areas given the shortages and conditions of schools in such areas. These shortages and conditions are acute and in extreme cases a teacher has to teach the entire primary school classes alone. Those factors could be important contributors to low pass rate in the province because even though the principal is experienced and capable, it is humanly impossible to teach and manage the entire school alone. This extreme case was observed by the researcher in a few primary schools – which means that sometimes secondary schools receive unfinished products from their feeder schools.

**(e) Reasons for entering teaching**

**Table 4.5: Personally satisfying job**

<b>V9 Highest qualification</b>	<b>Frequency (f)</b>	<b>Percentage (%)</b>
Agree	100	61,7
Neutral	29	17,9
Disagree	33	20,4
Totals	162	100,0

**Analysis and interpretation of data**

The data contained in table 4.5 illustrate that most teachers sampled (61,7%) enter teaching to have a personally satisfying job. This may augur well for retention, and account for low attrition. 17,9% of the respondents gave a neutral answer. Neutrality is not a permanent emotion or feeling, it may be changed if conditions of employment can be changed and improved. Another aspect of neutrality is that it fluctuates according to personal circumstances such as self-esteem, task variety and social orientation. The 61,7% who agree may be those who have higher levels of self-esteem, who enjoy task variety, task importance and participation. They are probably satisfied with their jobs, felt more valued and perceived their jobs as having higher levels of variety, importance and participation compared to those who disagree (Hayes, 2000:49).

Those who disagree constituted 20,4%. This percentage could represent a group of school managers that may quit teaching at some or other time. However, to indicate that one disagrees does not mean that one is ready to quit. It may be dissatisfaction emanating from less empowerment, improvement and commitment on the side of the Circuit, Region or Department. This could mean that job satisfaction is significantly related to the Circuit, Region or Department's lack of commitment to quality.

**Table 4.6: To have a high-paying job**

V15 Highest qualification	Frequency (f)	Percentage (%)
Agree	28	17,1
Neutral	46	28,0
Disagree	90	54,9
Totals	164	100,0

**Analysis and interpretation of data**

Table 4.6 reveals a significant finding that 54,9% of teachers disagree that they entered teaching to have a high paying job. This is probably the group of teachers who agree that they entered teaching because they want personal satisfaction (61,7%), they want to make a contribution to the society (86,5%) and to be of service to children (91,0). Although one cannot give a guarantee that teachers are satisfied with their salaries, it is possible to conclude that generally teachers not prioritising salaries for their continued service in the education system. Therefore, retention of teachers is a combination of several factors, not only salary, including those mentioned above. 82,2% percent of teachers agree that they entered teaching because they like children. This bodes well for their retention because 57,7% disagree that they entered teaching to have a backup job while pursuing another career. Therefore, there is a need to ensure their job security and a steady income so that those excellent teachers can remain teaching in the classroom. Their strength is that they knew what they were doing when they went to college or university (83,0% disagrees, V26).

**Table 4.7: To have job security and a steady income**

V9 Highest qualification	Frequency (f)	Percentage (%)
Agree	83	49,7
Neutral	50	29,9
Disagree	34	20,4
Totals	167	100,0

## **Analysis and interpretation of data**

The data contained in this table indicates that a large percentage of respondents (49,7%) claim to have entered teaching to have job security and a steady income. While the researcher agrees that employment in the public service could be seen as offering job security and a steady income, the researcher cannot condone the way in which probation and tenure in education were handled. The commitment to quality requires a review of probation procedures and tenure requirements (see chapters 2, 5 and 6 for more clarity). If the current way of managing retention (probation and tenure) are continued, then the ideal of quality will elude us. There are two sides to this finding. First, those who are satisfied that employment in teaching will offer them job security and a steady income may be highly motivated, but secondly, job security and a steady income should be enjoyed by teachers whom we are sure will meet the required standards in the performance of their daily tasks. The second side alludes to the fact that the accountability of the education system should be revamped to provide quality tenure. Tenure cannot be acquired en masse.

### **(f) Commitment to teaching as a lifelong career**

In this category, teachers were requested to indicate whether they agree, are neutral or disagree with features of a teaching career that satisfy them most. It appears that most teachers disagree (43,1%) that holidays are a major stimulant for their continued teaching. This concurs to Maslow's theory of motivation. It can possibly be concluded that teachers are satisfied more by task achievement and self-actualisation as well as a sense of superiority and belongingness, than by holidays. This is justified by 52,7% who agree that they continue to be of service in teaching because they wanted to grab the opportunity to practice one's own ideas. Perhaps this is not a true reflection of the situation on the ground taking into consideration that this survey focused mainly on members of management teams.

Whilst 49,7% agree that teaching offer job security and a steady income, 46,6% also agree that they entered teaching for economic security, a fact that may overrule reasons alluded to above. Another significant finding is that it appears that most teachers continue to serve because they seem to enjoy relationships with staff and pupils (78,8% agree), and are satisfied with working hours (56,6% agree). Therefore, it appears as if some of the conditions of service are perceived to be generally satisfactory. See the table below for more details.

**Table 4.8: Features of teaching that satisfy most**

Features		Frequencies (f)			Percentages (%)		
		1	2	3	1	2	3
Holidays	V28	51	40	69	31,9	25,0	43,1
Opportunity to practice one's ideas	V29	87	53	25	52,7	32,1	15,2
Economic security	V30	76	47	40	46,6	28,8	24,5
Staff/pupil relationships	V31	134	28	8	78,8	16,5	4,7
Working hours	V32	94	34	38	56,6	20,5	22,9

**(g) Factors offering teachers prospects of career retention**

**Table 4.9: Prospects of retention**

<b>V33 Factors offering prospects of retention</b>	<b>Frequency</b>	<b>Percentage</b>
Management	35	20,5
Curriculum	44	25,7
Teacher-pupil ratio	62	36,3
Affirmative action	15	8,8
Technology	15	8,8
Totals	171	100,0

**Analysis and interpretation of data**

This item dealt with factors over which teachers have little or no control but offer them prospects of career retention. Most teachers (36,3%) believe that the teacher-pupil ratio offers them the prospect of career retention. This is a reality which is taken into account by the employer. The Department of Education also uses teacher-pupil ratio as part of its post provisioning scales to determine posts. The availability of teachers depends on pupil enrolment. Where there are declining enrolments, some teachers have to be moved to other schools where there are acute shortages. This factor is also used in the process of redeployment.

Only 8,8% of the respondents believe that affirmative action and technology offer prospects of career retention. Perhaps the low response to these factors can be attributed to lack of understanding of affirmative action and the rate at which change occurs in most schools. It should be noted that the communities around the schools sampled were constituted of one race only. Many respondents may perceive that affirmative action means advancing Blacks where Whites are also

present. However, in reality there are many women serving in teaching and therefore they should also be advanced.

With regard to technology the intensity of technology in general appears to have been ignored. Perhaps there was a need to define technology more precisely. However, given the circumstances and conditions alluded to in paragraph (d) above, the low response may be attributed to the level of development in rural areas. Hence, teachers do not believe that technology may affect their career. The reality is that technology has come and develops and changes at a rapid rate. It is going to affect operational requirements of jobs. Consequently, teachers will need skills that will help them to retain their jobs. It is critical to be literate in technology so as to be functional in this technological era. Therefore, it appears that in rural areas, schools are "run as usual". There seems to be no deliberate attempt to reverse gender imbalances and to introduce technology in schools.

The 25,7% of the respondents agree that the curriculum is also a force to be reckoned with in the retention of careers. Only 20,5% of them believe that their continued service in teaching depends on management (Department of Education). It can be stated that the curriculum threatens prospects of career retention among teachers because one teacher's field of specialisation may not be relevant to any new curriculum introduced. This may include cases where for instance, a teacher is qualified in Biblical Studies and there is more emphasis on the natural sciences, mathematics and technology. Biblical studies ? teachers may thus be threatened by declining enrolments in their subjects. Over and above that, they may be lacking skills necessary for Curriculum 2005.

**(h) The most unsatisfactory aspect of teaching**

**Table 4.10: Unsatisfactory aspects of teaching**

<b>V35 Unsatisfactory aspect of Teaching</b>	<b>Frequency</b>	<b>Percentage</b>
Class size and workload	94	53,4
Status of the profession in society	13	7,4
Promotion prospects	13	7,4
Extent of non-professional work	12	6,8
Overwhelming changes	44	25,0
Totals	177	100,0

**Analysis and interpretation of data**

This data should be analysed and interpreted in the light of postulations and findings from research by HSRC (1998) as quoted in paragraph (d) of this section. 53,4% of the respondents regard class size and workload as the most unsatisfactory aspect of teaching. This percentage represents a group of teachers whose schools are probably understaffed and overloaded as a result. Perhaps this high response can be attributed to the fact that in most cases the formula for staff allocation based on teacher/pupil ratio does not practically translate into a sufficient number of required teachers because enrolment in subjects is ignored in favour of the entire school enrolment. Consequently, teachers whose subjects have a high enrolment are overloaded. This is probably the case in most schools.

Another significant number of educators (25,0%) feel overwhelmed by changes that are occurring in education. Perhaps, teachers are paradoxically overwhelmed by transformation initiatives. This concurs to findings arrived at by Monareng (1998:99) that most teachers (66,4%) feared change because it makes them uncertain about the future, are not sure of their qualifications and

affects their skills in handling the subject matter and discipline among learners. This fear for change seem to hold the truth when considering that the introduction of Outcomes-Based Education threatens to erode teachers' skills. The problem is exacerbated by insufficient training and development as well as insufficient supply of books and other learning materials.

(i) A means of recognising competence

Table 4.11: Promotion is a means of recognising competence

V44 Means of recognising Competence	Frequency (f)	Percentage (%)
Highly satisfactory	31	22,3
Satisfactory	43	30,9
Uncertain/do not know	26	18,7
Not satisfactory	31	22,3
Highly unsatisfactory	8	5,8
Totals	139	100,0

**Analysis and interpretation of data**

Promotion is regarded as a means of recognising competence. 22,3% of the respondents regard promotion as highly satisfactory, and the same percentage regard promotion as not satisfactory. It means that promotion probably occurs at an average rate. However, when considering the 30,9% who regard promotion as being satisfactory, one can conclude that promotion is taking place at a satisfactory rate although the percentage is too low. This item should be interpreted in the light of responses in V36. In V36 23,2% regard the rate of promotion as satisfactory, while 21,9% responded that it is highly unsatisfactory in their schools. These confirm the confusion that is ever troubling the education department in the Northern Province regarding promotion of principals as

permanent appointees. Many principals are acting for a long time. This creates a lot of problems in schools (see the report on informal interviews).

**(j) Career contingency factors**

**Table 4.12: Being male is regarded as a distinct advantage**

V47 Being male is regarded as a Distinct advantage	Frequency (f)	Percentage (%)
Very often	52	32,3
Rarely	34	21,1
Seldom	38	23,6
Never	37	23,0
Totals	161	100,0

**Analysis and interpretation of data**

The data contained in table 4.12 reveal that there are still perceptions of gender discrimination among the teachers sampled. 32,3% of the respondents believe that being male is very often regarded as a distinct advantage in getting promotion or any form of recognition. 21,1% believe that this practice rarely happens. It means that occurrence of gender discrimination is not significant but meanders. This seem to tally with the idea that gender discrimination or male biaseness seldom (23,6%) or never (23,0%) happen. Therefore, the researcher can conclude that male biaseness is perhaps so subtle that it cannot be openly seen. Perhaps it is hidden in recruitment and selection processes that cannot be physically seen. However, the numbers of women in management positions supports this idea – (see chapters two and three for more information). The way advertisements and job descriptions are designed and the manner in which interviews are conducted may contribute to male biaseness. Those who responded that it never happens probably did not know that advertisements or job descriptions which require marital status of applicants are discriminatory in nature, and that sometimes women are precluded from attending interviews because perhaps the composition of an interview panel is intimidatory to them

when it is constituted of males only. Given the patriarchal tendencies of our society, it is not wrong to say that the 32,3% of respondents who alluded to the fact that being a male is regarded as a distinct advantage are correct. Until such time that perceptions and mindsets of human resources managers are changed, is then that we can say being male is not an advantage.

**Table 4.13: Movement of teachers within a restricted geographical area**

V50 Movement of teachers	Frequency (f)	Percentage (%)
Very often	65	40,1
Rarely	30	18,5
Seldom	37	22,8
Never	30	18,5
Totals	162	100,0

#### **Analysis and interpretation of data**

This item probes the state of conditions in which teachers are willing to move between schools in a restricted geographical region that is within the commuting distance of their place of residence. 40,1% responded that teachers very often are willing to be redeployed between schools in a restricted geographical region that is within the commuting distance of their place of residence. It seems as if the precondition for the acceptance of redeployment is the teacher's place of residence —its proximity to the place of work. It means, if teachers can be moved within a Circuit or District there may be a greater acceptance of the process of redeployment. The conventional practice was that inspectors would move teachers within their area of management (Circuit or District) if there was a decline in pupil enrolment at a particular school within their Circuit or District. Therefore, moving teachers away from their homes may be met with resistance.

**Table 4.14: Working in rural areas**

<b>V54 Willingness to work in rural Areas</b>	<b>Frequency (f)</b>	<b>Percentage (%)</b>
Very often	18	11,1
Rarely	41	25,3
Seldom	47	29,0
Never	56	34,6
Totals	162	100,0

**Analysis and interpretation of data**

The data in this table complement the analysis and interpretation above. 34,6% responded that teachers are never willing to work in rural areas. When considering that the Northern Province is 90,9% rural, and that 88,6% of the respondents work in a rural village, it appears that most teachers are living in townships (which constituted 9,7% in this research project) or semi-urban areas. Therefore, teachers may not willingly work in rural areas if options of working in a developed or semi-developed area are there. Consequently, the researcher can possibly conclude that teachers may be willing to be redeployed to urban areas. However, what still needs to be investigated is whether living next to one's place of work is a precondition or whether the level of development in one's place of work or home is precondition in redeployment.

Only 11,1% responded that they think that teachers are very often willing to work in rural areas. This may emanate from the fact that there is a large number of unemployed teachers who are desperate for work. These unemployed teachers are willing to take on a job anywhere – rural or township. Another dimension of these responses may be that most teachers are from rural areas, and therefore, see no problem in working in rural areas – which is antithetical to 25,3% who responded that teachers rarely volunteer to work in rural areas. The latter group

concur with 29,0% who responded that teachers seldom volunteer to work in rural areas. May be we need to look at the social status of teachers. Their social status emanates from the early socialisation such that they are aware of their distinct social identity, as people separate from others. It is this self-consciousness that causes teachers to form social groups who interact in systematic ways with one another. According to Giddens (1993:215) teachers are a particular class whose membership is based on literacy and economic differences and these differences are expressed in relationships. As a middle class they find it less easy to socialise with persons of different classes. Their reputational tendencies possibly render them asocial in rural areas – which are predominantly lower class habitats.

#### (k) Possible reasons for leaving teaching

**Table 4.15: Inadequate, low salary**

V55 Inadequate, low salary	Frequency (f)	Percentage (%)
Agree	102	61,1
Neutral	32	19,2
Disagree	33	19,8
Totals	167	100,0

#### **Analysis and interpretation of data**

61,1% responded that they agree that they may possibly leave teaching as a result of inadequate or low salary. This seem to contradict 54,9% of respondents who disagree that they entered teaching to have a high-paying job (V15), but instead wanted to have a satisfying job – 61,7% agreed in V14. The question revolves around salary or money and satisfaction. That is, whether money leads to satisfaction, or not. The 61,7% in V14 who responded that they chosen teaching because they wanted a satisfying job, possibly represents a group of teachers who were drawn into teaching by successful teachers who were their

role models. The researcher may assume that the respondents probably did know that there is V55 when responding to V14, or it may be because their expectations were not met – as shown by 61,1%. Therefore, the 54,9% in V15 who disagreed that they entered teaching a high paying job is a fluke. 19,2% are neutral while 19,8 disagreed that low salary can be a possible reason for leaving teaching.

**Table 4.16: Opportunity to do something else more rewarding**

V57 Opportunity to do something else	Frequency (f)	Percentage(%)
Agree	89	55,6
Neutral	29	18,1
Disagree	42	26,3
Totals	160	100,0

#### **Analysis and interpretation of data**

This data concurs with the findings in V55 that most teachers may possibly leave teaching as a result of inadequate salary. 55,6% of the respondents may leave teaching if they can find the opportunity to pursue another career. These respondents may be demotivated and disillusioned by several factors. For instance, 64,8% of respondents to item V58 cited poor working conditions as the possible reason for leaving teaching. Poor working conditions is a broad concept which includes classroom conditions, the availability of teaching and learning resources, leaves, salary, workload, leadership, employer's labour policies, and many other terms of employment. The findings reveal that very few, 17,0% (V58) are determined to stay in teaching despite the appalling conditions, while (18,12%) of V58 are neutral which means they may go either way depending on the developments taking place. However, the picture is not as bleak as it might be suggested because 26,3% of respondents to item V57 are still determined to remain in teaching. Perhaps it is important to make a deliberate attempt to woo the 18,1% of V57 and 18,2% of V58 who are neutral. Together with those who disagree, those who are neutral may form a formidable force to continue with the

service of teaching. Their tenacity and determination should be regarded as an advantage to improve where necessary.

In life not all can be satisfied. The same happens in teaching – not all teachers will be satisfied. Their dissatisfaction may arise out of different aspects as indicated above. In addition to those aspects indicated above, there are teachers who want to leave as a result of emotional aspects. This was probed in V62 as shown in the table below:

**Table 4.17: Emotional aspects**

V62 Emotional aspects	Frequency (f)	Percentage (%)
Agree	81	49,1
Neutral	34	20,6
Disagree	50	30,3
Totals	165	100,0

#### **Analysis and interpretation of data**

This data reveal that emotional aspects have taken its toll among teachers. 49,1% of the respondents agree that most teachers are stressed and frustrated. There are various causes to emotional stress and frustration. For instance, teachers may be stressed by:

- student ill-discipline;
- political changes;
- policy changes;
- poor working conditions;
- insufficient skills;
- job security;

- poor communication;
- poor relations at work; and
- inadequate rewards.

While it may be acknowledged that the above problems are job-related, there are problems that are family or socially related in nature. For example, teachers may be stressed by:

- poor family relations;
- HIV-Aids;
- failure to support their families;
- debts;
- cultural differences;
- decline in morality;
- divorce; and
- community problems.

While the Department as the employer may have the prerogative to redress job-related problems perhaps with little ease, as the employer who is concerned and committed to quality, the department must show the willingness to address teachers' social problems by exploring psychological or other means available. This will ensure that workers are generally happy. A happy worker is a productive worker. Therefore there must be a holistic approach to teachers' problems. However, 30,3% of the respondents disagree that teachers may leave

teaching because of emotional aspects. This percentage represents a group of teachers who probably are free from problems or may choose to ignore their problems and take refuge in incessant toil which in the long run may do them no good. 20,6% are neutral.

**(I) Management principles**

**Table 4.18: I spend too much time sorting out problems that my subordinates ought to be able to deal with.**

<b>V55 Spend too much time sorting out problems</b>	<b>Frequency (f)</b>	<b>Percentage (%)</b>
Agree	63	37,1
Disagree	107	62,9
Totals	170	100,0

**Analysis and interpretation of data**

37,1% of the respondents agree that they spend too much time sorting out problems that their subordinates ought to be able to deal with. This response indicates the level of empowerment that is prevalent among teachers. This has management implications. It could imply that the leadership style used by such managers centralises power by not delegating some of the responsibilities to other team managers. Such managers often tend to have a know-it-all attitude. They regard themselves as the custodian of power – which no one should share at school level. Hence, the response there is too much from teachers to deal as a manager.

Those who disagree, 62,9%, are the type of educational leaders who may tend to share power with other team managers. They are not baffled by any job because they know they have other team members to count on. They are probably democratic and facilitative in their leadership style.

**Table 4.19: It is difficult to execute many education office decisions**

<b>V66 Difficulty to execute many Decisions</b>	<b>Frequency (f)</b>	<b>Percentage (%)</b>
Agree	102	60,7
Disagree	66	39,3
Totals	168	100,0

**Analysis and interpretation of data**

60,7% of the respondents agree that it is difficult to execute many education office decisions. The responses represent a group of managers who may not be schooled in education management. Such managers lack sufficient management skills. They are probably under pressure and may be overwhelmed by the management job. This concurs to the above analysis and interpretation, whereby managers centred every task around themselves and do not want to share responsibilities. Therefore, the difficulty to execute many decisions may arise out of lack of skill and time. This has been an argument the researcher raised in chapter two with regard to teaching excellence and experience not necessarily meaning that one can be an efficient and effective manager.

Perhaps it is proper to conclude that the 39,3% of the respondents who disagreed are the ones who are schooled in education management, and therefore have the necessary skills that make them efficient and effective. However, with regard to the former group, there is a greater possibility that they may be encountering communication problems. The report on informal interviews bears testimony to this. Consequently most of their important decisions are based on insufficient information 70,1% agree to this in V67.

**Table 4.20: A good manager is the one who shares decision-making and work**

<b>V55 A good manager shares decision-making</b>	<b>Frequency (f)</b>	<b>Percentage (%)</b>
Agree	167	98,8
Disagree	2	1,2
Totals	169	100,0

### **Analysis and interpretation of data**

98,8% of the respondents agree that a good manager is one who shares decision-making and work. This is the benchmark of excellence in governance and management. The response resonates with the spirit of the South African Schools Act, 1996. This Act envisages governance and management of schools as partnership between stakeholders. It entails that a number of people who have a common goal, co-operate with one another by contributing something of value. Sharing decision-making and work emerges out of the need to recognise diversity in our schools. Therefore, education management and governance requires recognition of other stakeholders' duties and responsibilities as defined in the roles of each partner. Consequently, it is no longer possible for education managers to make decisions in a vacuum. More partners should be considered. The 1,2% of the respondents who disagreed may be those who still believe in education management as a one person show-whereby all governance and management responsibilities are vested in one person. In most cases such leaders are autocratic and prefer the bureaucratic style of management. What often predominates in such schools is a top-down strategy of management. Education management is a complex task wherein no individual can claim to be an all-rounder. It is possible that in most cases those who disagreed are not willing to let their staff decide on teaching routine activities (V69) – which constituted 10,0% of the respondents. 90,0% of V69 are willing to devolve power so that teachers can decide on teaching routine activities. This group could represent the respondents who share decision-making and work, and take pride

take pride in their teachers (23,4% of V70). The 76,6% of respondents in V70 probably value teachers as a critical resource without which no education can take place. Such managers usually have good relations with their staff members.

Perhaps, the 23,4% of respondents who do not take pride in their teachers have something that engulfs them from staff. However, the response could be viewed in the light of the history of principals (including deputy principals and HODs) and staff members in some schools. This history is echoed by Fleisch (1999:60) who states that since the early 1990s there was a crisis of legitimacy of principals. The authority of school managers was challenged even by unions. Principals were labelled as sell-outs, reactionary to democracy and social change. What exacerbated matters was the use of an authoritarian style of management. In the name of unions teachers countered authoritarianism of the principals. In some schools *coup dé tat* happened. Some principals who bore the brunt of teacher militancy often shirked responsibility and exonerated teachers from crucial responsibilities. Consequently, a laissez faire situation sets in. Therefore, such principals would not take pride in their teachers even though the situation cannot be wholly blamed on teachers. They too are partly to blame. Nevertheless, there are those who still believe that teachers should be involved to decide on policy matters. 88,7% in V73 agree to this. This provides a ray of hope in stabilising human relations, as opposed to 11,3% who disagreed.

Perhaps, it will be proper to state that the shift of paradigm from a service and quality demand poses a serious challenge to managers. Unfortunately the shift to a new paradigm is challenging to implement and the process is primarily difficult to maintain because some managers are still "locked in their closets". Is it because they benefited by the older paradigm or are just uncertain of the future? In spite of whatever belief, quality management requires a change in roles and perceptions. For instance, managers must perceive themselves as

facilitators. Educational managers must influence the transformation system. In V75 92,2% of the respondents agree to this, while 7,8% disagreed. It can be concluded that many respondents are happy about the transformation process and see themselves as facilitators in the process.

**(m) The role of the district or area manager in empowerment**

First and foremost it must be established that the district or area manager's commitment to quality are related to the amount of lack of feedback. Perhaps the chief education specialist should probably commit themselves to quality actions such as providing teacher training and development, continually looking for ways to improve quality and encouraging high quality work, and create work environments in which a great deal of job performance feedback is given. The management's commitment to quality may be positively related to job satisfaction. As such, the role of district or area managers should be measured against this background.

**Table 4.21: Value commitment to the development of the individual within the district.**

V76 Commitment to the development of teachers	Frequency (f)	Percentage (%)
Always	29	15,9
Often	49	29,9
Seldom	61	37,2
Never	28	17,1
Totals	164	100,0

### Analysis and interpretation of data

It seems district or area managers according to the perception of the respondents do not value commitment to the development of the individual teacher or manager within their district or area. 37,2% of the respondents concur to this, while 17,1% declared in no uncertain terms that district or area managers never value such commitment. Perhaps it can be stated that this higher response may probably emanate from the fact that the district or area development programmes do not match the needs of the teachers. In such cases, these managers still use traditional in-service based, one-size-fits-all development programmes whereby teachers' interest are ignored. In some cases there may be a communication breakdown. It is unlikely that a district or area may be sterile for the whole year. This 'seldom' and 'never' responses may indicate a deep-rooted problem which need intensive investigation. To concur to the argument that it is impossible for the area or district not to call for inservice-development, 15,9% and 29,9% responded always and often respectively. Therefore, a balanced conclusion may be that the programmes are scattered and periodic incursions into schools which affect one or two teachers in sporadic opportunities.

**Table 4.22: Value all employees as equally important members of the organisation**

V80 Value all employees equally	Frequency (f)	Percentage (%)
Always	63	38,9
Often	38	23,5
Seldom	47	29,0
Never	14	8,6
Totals	162	100,0

### Analysis and interpretation of data

38,9% of the respondents indicated that the district or area manager always value all teachers as equally important members of the organisation. It means most area managers do not discriminate among teachers. They are fair and non-sexist in executing their jobs. 23,5% responded that to the district or managers often value all employees equally. It means that there are in some instances whereby equality or equal treatment is not experienced by teachers. Some respondents felt the district or area manager seldom valued all employees equally – 29%. Despite the efforts from the district or area managers to treat all teachers equally, there are those who believe district or area managers are unfair in the treatment of teachers. Hence 8,6% responded that district or area managers never value all employees equally. It can be concluded that district or area managers value all employees equally, but certain anecdotal cases may flout their commitment to equality.

**Table 4.23: Value placing decision-making as close to the point of implementation as possible**

V84 Decentralisation of decision-making	Frequency (f)	Percentage (%)
Always	36	22,2
Often	51	31,5
Seldom	60	37,0
Never	15	9,3
Total	162	100

### Analysis and interpretation of data

22,2% responded that the district or area manager always value placing decision-making as close to the point of implementation as possible. These respondents represent a group of teachers who believe that the area manager

has allowed teachers to be autonomous, and have freedom to practice their own ideas. Their innovation and creativity is harnessed as important resources to further teacher development. However, the decentralisation of decision-making does not always take place, but occurs often - 31,5%. It means that district or area managers allow teachers powers to decide on certain issues, but not in all activities. Depending on one teachers' perception restricting decision-making to certain issues may not be viewed as non-decentralisation at all. Hence 37,0% responded that the area managers seldom value placing decision-making as close to the point of implementation as possible. This compares to 9,3% of the respondents who believe that there is no decentralisation at all. It can be concluded, in terms of these last two responses, that district or area managers seldom value decentralisation in some instances.

**Table 4.24: Value all employees as equally important members of the organisation**

<b>V80 Value all employees equally</b>	<b>Frequency (f)</b>	<b>Percentage (%)</b>
Always	57	34,8
Often	47	28,7
Seldom	47	28,7
Never	13	7,9
Total	164	100

#### **Analysis and interpretation of data**

Data contained in this table reveal that the district or area manager in 34,8% of the respondents' perceptions is always ready to support school development plans. These respondents represent a group of school managers who take initiatives to develop their schools. Such managers are proactive, and are ready to consult the district or area manager in aspects which need the latter's attention. From these responses, it can be concluded that many principals feel supported by the area manager in their plans for school development, and that

very few, 7,9% feel unsupported. Therefore, it seems as if district or area managers are probably managing well. However, 28,7% believe the support of area managers is not continual but continuous – it has some breaks. It means that sometimes it may probably be available or the other times unavailable. Equally, 28,7% of the respondents believe that the district or area manager seldom value support for school development plans.

(n) **Change management**

**Table 4.25: I like to be told exactly how I am to do my job**

<b>V95 Being told exactly how to do my Job</b>	<b>Frequency (f)</b>	<b>Percentage (%)</b>
Agree	91	55,5
Disagree	73	44,5
Total	164	100

**Analysis and interpretation of data**

55,5% of the respondents agree that they like to be told exactly how to do the job. This percentage represent a group of teachers who want the details of a particular job before executing anything. They are probably some of the teachers who need support all throughout their career. Such teachers seem to lack creativity and innovation and cannot venture into unknown frontiers. Therefore, it can be concluded that most teachers are not creative and innovative to carry out tasks assigned to them. However, 44,5% disagree that they do not want to be told exactly how to do their jobs. This percentage of respondents could represent a group of teachers who are creative and innovative enough to tackle any task with minimum effort. They probably like to be independent and autonomous which is a benchmark of professionalism. It means that they are complete professionals who test the uncharted waters. Therefore, it can be

concluded that these teachers are professionals, creative and innovative although they do not constitute a significant percentage of the respondents.

**Table 4.26: I am keen to try things out to see if they work in practice**

V96 Keen to try things to see if they Work	Frequency (f)	Percentage (%)
Agree	158	96,3
Disagree	6	3,7
Total	164	100

#### **Analysis and interpretation of data**

96,3% responded that they agree to be keen to try things out to see if they work in practice. This percentage represents a group of teachers who are innovative and creative enough to explore alternatives. These teachers may probably not function well in a bureaucratic set up because they will have to follow certain bounds (protocol) which may preclude their creativity and innovation. They are like the 44,5% who disagreed in V95. Therefore, it can be concluded that most teachers are keen to try things out to see if they work in practice. Perhaps this is indicative of their level of motivation. Motivated workforce seem to possess this characteristic. Very few teachers (3,7%) are not keen to try things out to see if they work in practice. This percentage represents a group of teachers who should be managed closely and seem to enjoy to be told what to do. They cannot do things using their own initiative. Perhaps it is probably correct to question their retention, or alternative ways of retaining them need to be identified. The researcher has tried to address this in the recommendations - in the form of short term and long term strategies.

**Table 4.27: I give up on things before completing them**

<b>V99 Giving up on things before completion</b>	<b>Frequency (f)</b>	<b>Percentage (%)</b>
Agree	25	15,1
Disagree	141	84,9
Total	166	100

**Analysis and interpretation of data**

15,1% of the respondents agree that they give up on things before completing them. This percentage represents a group of teachers who probably like to be told exactly how to do their job because they seem to give up if not told how to do the job. They probably can not go on their own. Therefore, they need empowerment programmes to survive in their positions. The researcher has suggested empowerment strategies in chapter six to address this problem.

However, 84,9% disagree that they give up on things before completing them. This percentage represents a group of teachers who are innovative, motivated, have the tenacity and determination to complete tasks. They are resilient and want to succeed despite all odds. These group of teachers should be retained in the classroom and may be the right personnel to tackle education problems. Therefore, it can be concluded that most teachers have the tenacity and determination to succeed, despite challenges they meet in their day-to-day tasks.

**Table 4.28: If something looks too complicated, I will not bother to try it**

V101 Not bothering to try complicated things	Frequency (f)	Percentage (%)
Agree	22	13,3
Disagree	143	86,7
Total	165	100

**Analysis and interpretation of data**

13,3% of the respondents agree that if something looks too complicated, they will not bother to try it. This is a group of teachers who like to be told how to do their job. On the contrary, 86,7% of the respondents disagree on the statement. This is a group of teachers who are also keen to try things to see if they can succeed. They tend not to give up when meeting complications. Therefore, it can be concluded that most teachers are ready to try things out even if those things are complicated in nature.

**Table 4.29: Teachers need to improvise to keep the education system going**

V111 Teachers need to improvise	Frequency (f)	Percentage (%)
Agree	155	93,9
Disagree	10	6,1
Total	165	100

**Analysis and interpretation of data**

93,9% of the respondents agree that teachers need to improvise to keep the education system going. By improvising, it entails making initiatives to address shortages in resources and seeking innovative ways to supplement and complement resources available. This group of teachers do not complain but seek ways to complement and improve their conditions. They are required to

steer transformation forward. Therefore, it can be concluded that most teachers are ready to move on with the changes taking place in education. However, very few teachers, 6,1%, disagree that teachers need to improvise.

(o) **Teams, partnerships and networks**

**Table 4.30: Schools should partner with tertiary institutions**

V130 Schools should partner with tertiary institutions	Frequency (f)	Percentage (%)
Almost always	95	58,6
Quite often	45	27,8
Hardly ever	10	6,2
Never	12	7,4
Total	162	100

**Analysis and interpretation of data**

58,6% of the respondents responded that schools should almost always partner with tertiary institutions. In terms of this percentage it can be concluded that most teachers would want to establish partnerships with colleges, technikons and universities. This partnership may probably be a strategy to address skill shortages, teacher empowerment and capacity building. Very few 7,4% are opposed to partnerships with tertiary institutions. Perhaps this group should be compared with V115 whereby 28,8% agreed that learning new skills doesn't excite them. This response could indicate teacher apathy to further studies.

**Table 4.31: Schools should partner with parents**

<b>V132 Schools should partner with parents</b>	<b>Frequency (f)</b>	<b>Percentage (%)</b>
Almost always	134	83,8
Quite often	17	10,6
Hardly ever	6	3,8
Never	3	1,9
Total	160	100

**Analysis and interpretation of data**

83,8% of the respondents agree that schools should partner with parents. Therefore, it can be concluded that most teachers are not opposed to parental involvement. Very few, 1,9% do not want to welcome parental involvement. This is a less significant number of respondents. 10,6% believe that a partnership with parents should happen quite often. It means that parents should be involved in education, when there is a need, but not always.

**Table 4.32: Partnerships with unions can better minimise strikes**

<b>V133 Partnerships with unions</b>	<b>Frequency (f)</b>	<b>Percentage (%)</b>
Almost always	79	48,8
Quite often	53	32,7
Hardly ever	18	11,1
Never	12	7,4
Total	162	100

**Analysis and interpretation of data**

48,8% of the respondents believe that partnerships with unions can almost always minimise strikes. This percentage represents a group of teachers who seek mutualism between schools and unions. To them such a compromise will

minimise strikes. Perhaps it is important to consider the reasons for school-union partnership. The reader should consider that this partnership is based on essential elements such as:

- The partnership is conducted for the joint benefit of both parties involved.
- The object of the partnership is to restore the culture of teaching and learning – an ideal attested to by Braude (2000:10) whereby it must be understood that teacher unions do not seek to destroy the system but also to improve the working conditions – overcrowded classrooms, and shortage of books, to name but a few.

This new vision is supported by most teachers because it will make unions share the responsibility in restoring the culture of quality service in education. This partnership will offer more freedom from government regulations and offer greater flexibility in minimising strikes. There would be unlimited personal liability. A partner cannot only demand material improvements but would seek ways to contribute to the growth of the organisation. This will resonate with the spirit of tirisano which seeks to interrogate the lack of discipline and professionalism among some teachers. This tendency has created perceptions that teachers do not care about the future of children. Therefore, the partnership can benefit schools by joint enforcement of discipline through a code conduct, and even urging teachers to arrange for extra classes to cover time lost during strikes. This will concur with 32,7% of the respondents who wanted to see the partnership happening quite often – which means that partnership with unions should be forged in some issues. However, there is 7,4% who are opposed to this partnership. Perhaps this group is conservative, lack information which will enable them to understand unions as significant stakeholders in education. Equally, 11,1% of the respondents believe that partnerships with unions should hardly ever take place. Therefore, there is still much to be done before such partnerships can really happen. However, when considering the highest

response of 48,8%, the researcher can conclude that partnerships with unions are a necessary evil to help restore the culture of quality service. And unions are part of the equation to quality service in education.

**(p) Excellence in teaching**

**Table 4.33: Teachers do an excellent quality job despite insufficient resources**

V136 Teachers do an excellent quality job	Frequency (f)	Percentage (f)
Believe	131	80,4
Disbelieve	32	19,6
Total	163	100

**Analysis and interpretation of data**

80,4% of the respondents believe that teachers do an excellent quality job despite insufficient resources. This group compares with 93,9% of the respondents in VIII who agree that teachers should improvise to sustain the education system. Those who improvise are able to offer quality teaching despite insufficient resources. When considering V13 that 88,6% of the respondents come from rural areas where, according to the HSRC (1998), there is an acute shortage of resources, it can be stated that teachers are still motivated to continue doing quality jobs. They are probably not discouraged by insufficient resources. However, 19,6% of the respondents disbelieve that teachers are doing an excellent quality job. Nevertheless, the 80,4% takes the primacy, and thus it can be concluded that most teachers do an excellent quality job. Hence the reference to the fact that teachers are enthusiastic about their jobs – 70,8% believe in this while 29,2% disbelieve in enthusiasm.

**Table 4.34: Teachers are involved in unions to cover their inefficiency and ineffectiveness**

<b>V139 Teachers are involved in unions</b>	<b>Frequency (f)</b>	<b>Percentage (%)</b>
Believe	41	25,0
Disbelieve	123	75,0
Total	164	100

**Analysis and interpretation of data**

25,0% of the respondents believe that teachers are involved in unions to cover their inefficiency and ineffectiveness. Perhaps it can be stated that this response was based on anecdotal or isolated incidents of ill-discipline among some teachers. However, 75,0% disbelieve that teachers are involved in unions to cover their inefficiency and ineffectiveness. Therefore, it can be concluded that most teachers are involved in unions for other reasons than to probably hide their inefficiency and ineffectiveness. Reasons for involvement in unions are varied.

**Table 4.35: Teachers are demoralised by lack of commitment from learners**

<b>V141 Teachers are demoralised</b>	<b>Frequency (f)</b>	<b>Percentage (%)</b>
Believe	118	71,5
Disbelieve	47	28,5
Total	165	100

**Analysis and interpretation of data**

71,5% of the respondents believe that teachers are demoralised by a lack of commitment from learners. When considering the 93,9% of the respondents in VIII and 80,4% of the respondents in V136, it means that the good intentions and efforts of teachers in improvising and doing an excellent quality job are wasted by learners who lack commitment. This may seem to be the habit of passing the bug to learners. However, historical evidence reveal that most schools had been

subjected to conflict linked to student resistance to Bantu Education. Since 1976 the cycle of resistance and repression had given birth to a culture of resistance in which student activists channelled away their energies from blanket rejection of all forms of apartheid education to idleness and recalcitrancy. They challenged the authority of teachers and school managers. Ultimately, many learners lack commitment to education. A disturbing trend was the emergence of laissez-faire management in the classroom because corporal punishment is prohibited. Most teachers leave learners unrebuked, and truancy becomes the order of the day.

Nevertheless, 28,5% of the respondents disbelieve that teachers are demoralised because of a lack of commitment from learners. It means that teachers are demoralised because of some other reasons but not as a result of lack of commitment from learners. To balance the probabilities the researcher can conclude that there are still 'struggles' waged in schools which disturbs order, and some teachers shirk responsibilities but the majority are still committed to excellent teaching.

#### **4.7.4 Most important findings from the empirical survey**

The empirical survey reveals the following most important findings:

- There seems to be a considerable improvement in gender equality with more women promoted into managerial positions in schools – especially primary schools.
- Most principals are in their late thirties or early forties.
- Very few schools have a complete set of appointed managers – in some schools principals have to teach and manage schools.

- Most managers have a degree and a diploma as their highest qualification, and most of them have specialised in humanities.
- Most schools are located in rural areas and have insufficient resources.
- Most teachers entered teaching to have a personally satisfying job than for material reasons.
- Teachers are enthusiastic about professional autonomy.
- Teaching engenders a sense of belonging through human relations.
- Most teachers are satisfied with the working hours.
- Most teachers regard curricular changes and teacher-pupil ratio as threats to their prospects of career retention.
- The most unsatisfactory aspect of teaching remains class size and heavy workload.
- Most teachers believe that having a degree gives one an advantage when selection is made.
- Teachers are willing to move between schools in a restricted geographical region which is within commuting distance of their place of residence.
- Most teachers agree that further study augurs well for one's prospects of promotion.
- Most teachers consider experience as an indication of one's competence.
- Most teachers are unwilling to work in rural areas.
- Most teachers are generally not satisfied about rewards used in teaching, and poor working conditions is cited as the most possible reason for leaving the teaching profession.

- The highest percentage of principals believe in sharing decision-making and work.
- Very few teachers believe that the area or district managers value support, equality, involvement and shared decision-making.
- Most principals, who like to be told exactly how to do their job, are not creative and innovative, and are not adventurous to try new and complicated tasks.
- Most teachers believe that they need to improvise to sustain the education system.
- Teachers are keen to establish partnerships with tertiary institutions, parents and unions.
- Teachers do an excellent job despite insufficient resources.
- The reasons for teachers to be involved in unions are varied but do not include hiding their inefficiency and ineffectiveness.
- Teachers are demoralised by a lack of commitment from learners.

#### **4.8 CONCLUSION**

The empirical research is used to complement the literature review which only gives the theories about recognition of competence, empowerment and capacity building and retention of excellent teachers, whilst the empirical research gives the real picture of the situation. Talking to the management teams of schools presented the researcher with the opportunity to experience genuine happenings, conditions and how principals and teachers feel about recognition of competence, empowerment and capacity building as well as the retention of excellent teachers. This exercise illuminate ideas for further research which is discussed in the next chapter. The researcher discussed, analysed and

interpreted data gathered from the survey and the most important findings were identified. In the next chapter guidelines for the recognition of competence as an empowerment model to retain excellent teachers in the classroom are suggested.

## CHAPTER FIVE

### 5. GUIDELINES FOR THE RECOGNITION OF COMPETENCE AS AN EMPOWERMENT MODEL TO RETAIN EXCELLENT TEACHERS IN THE CLASSROOM

#### 5.1 INTRODUCTION

The previous chapters have argued that teachers are key elements in the provision of quality education. Thus, it is crucial that teachers who are retained should remain competent. Chapter 2 has developed a model for the recognition of competence and Chapter 3 advanced the recognition of competence through empowerment and capacity building. In chapter 4 an empirical research was employed to scientifically prove the portfolio of recognition of teacher's competence in schools. In this chapter the researcher attempts to further point out the necessity of recognition of competence and provides guidelines on how to go about recognising teachers' competence, empower them and build their capacity as well as exploring alternatives of retaining teachers.

#### 5.2 DISCUSSION AND ANALYSIS OF THE FINDINGS

##### 5.2.1 Findings from literature study

###### 5.2.1.1 *Recognition of competence*

Literature study reveals that recognition of competence has the tendency to be equated with occupation, profession and career. As an occupation it involves a relatively continuous pattern of activities that provide workers with a livelihood and define their general social status (Taylor, 1992:15). Recognition of competence is a professional process typified by the provision of service to other people, specialised knowledge, autonomous practice, regulation of standards and norms through a code of ethics and development of competence through professional bodies and organisations (Badenhorst & Scheepers, 1995:68-69). What is noted with such maxims is that teaching as a profession possess intellectual techniques and requires a high level of commitment in

which work and leisure hours are not easily demarcated, offers a life-time calling within a career structure and encourages the pursuit of research, the diffusion of knowledge and inservice training (Taylor, 1992:16).

Furthermore, recognition of competence has an element of career, which may be defined as being a succession of functionally related jobs which are arranged in a hierarchy of prestige and through which a person move in a more or less ordered sequence. This invokes a sense of hierarchy emanating from vertical mobility, and horizontal mobility (Taylor, 1992:17). It integrates variables of both a psychological and sociological nature such as the NQF, recruitment and selection, appointment and tenure, equality and equity as well as organisational factors of teacher satisfaction.

Research findings in this sector reveals that recognition of competence is generally planned and patterned; is manifested in horizontal and vertical mobility; is influenced by contingent factors such as age, level of experience, gender, marital status, academic and professional qualification, and is unfolded in distinct stages; that more men are promoted in secondary schools than women and that more women are promoted in primary schools than men (Taylor, 1992:55); women took longer than men to achieve advancement to the various promotion positions (Department of Education, 1997:198); graduates received promotion more quickly than did non-graduates; and that rewards are limited in education (Rebore, 1991:249).

Finally, the literature study undertaken in Chapter 2 established that the key issue in human resource development is how to validate training courses, certificates, and recognise and reward performance. It was revealed that there is a need to identify agreed competencies – skills, knowledge, understanding and attitudes – within the context of the National Qualifications Framework; improve accreditation; recognise accumulated experience and improved performance through promotion and rewards; and identify competencies required for selection and appointment (Task Team, 1996:47).

### **5.2.1.2 Empowerment and capacity building**

Literature study in this field revealed that workplaces are constantly changing as a result of different variables, and therefore individuals need support and continuous improvement in order to remain in the classroom and to make excellence a hallmark of our education system. It is evident that the challenge is to provide the kind of support, skills and knowledge that will enable each individual to contribute as much as possible.

According to the Department of Education (1996:46) and Davidoff & Lazarus (1997:162) there are two dimensions to empowerment and effective capacity building:

- subjective empowerment
- objective empowerment

Objective empowerment refers to personal power – where people believe they can make the difference, are confident and assertive as well as participative. This emanates from appointment, promotion and upgrading procedures, access to information and resources and devolution of decision making power. It was noted in Chapter 3 that the transfer of power was problematic due to personal fears, unfamiliarity to new changes and the legacy of apartheid. Power, control and responsibility are rarely shared.

Subjective empowerment focuses on teachers' sense of 'I can do this' which originates from a feeling of self-confidence and motivation, and promotes high morale. Studies in this field reveal that (Steffy, 1989:4; Hess, 1992:26).

“too many schools are staffed with stale, burnout teachers. They are laced with rigidity and loaded with cynicism”.

Teachers are engaged in repetitious tasks which often become less challenging, their excitement has waned and their enthusiasm has slackened. This is not strange because like everyone involved on repetitious task teachers can get stale and lose interest (Steffy, 1989:3). Hence there is a need to continually refine skills, knowledge and attitudes.

Furthermore, the education system needs to recognise the diversity within the pool of human resources. This entails recognition of skills, knowledge, attitudes and cultures of men and women equally and equitably. The serious challenge is development of anti-discriminatory practices with regard to race, gender and disability. Studies conducted by Eyber, Dyer & Versfeld (1997:1) reveal that there is still racism in some of our schools even though the new democracy is ushered in. Equally, the Department of Education's (1997:208) investigations made with regard to the profiles of gender equity in education reveal that very few women are managers in education (Bray & Maile, 1999:271).

Therefore, guidelines and strategies which will suggest ameliorative principles in this regard must focus on mechanisms for transfer of power without losing it, harnessing teachers' creativity through teams, networks and partnerships, development and equity issues.

### **5.3 GUIDELINES**

#### **5.3.1 Recognition of competence**

All organisations must acknowledge the need to establish an equitable balance between the employee's contribution to the organisation and of the organisation's contribution to the employee. Meeting this need is the first reason to recognise and reward employees (Deeprise, 1994:3). Although many school managers feel they have no control over teachers' recognition and reward, it is important to realise that teachers are not working for money. They are looking for a number of other returns to justify the time, energy, mental and emotional effort they devote to the organisation.

The reasons for recognition of competence are varied and diverse. But Deeprise (1994:3) feels that equity, motivation and clarification are the main reasons for the recognition of competence. Equity requires that the organisation contribute to meeting employees' needs for esteem, creative challenge, professional growth, and socialisation to the same degree that employees contribute to meeting the objectives of the organisation. Equity reasons can be summed up in the following equations:

- What the employee receives from the employer must be equal in value to the quality and quantity of work done by the employee.
- What the employee receives from the employer must be equal in value to what is received by other employees doing similar work of similar quality and quantity.
- What the employee receives from the employer must be equal in value to what is received by people who do similar work for other organisations.

Recognition of competence is a way of inspiring individual teachers and teams to do the best possible job by creating an environment in which they want to perform to the best of their abilities. There are plenty of ways in which a manager can influence the strength of an employee's internal motivation (Rebore, 1991:249). One way is to provide incentives. However, one must clear up the misconception that money is the main motivator. For instance its impact is short-lived, it starts out as a reward for exceptional performance and is later perceived as an entitlement, and when people are paid to do specific tasks, money tends to supplant intrinsic motivation (Deeprouse, 1994:11-12). For this reason, reference should be made to Herzberg theory of motivation. And finally, people should know the reasons why they are rewarded and this is clearly spelt out in the following guidelines.

#### **5.3.1.1 Ways of recognising competence**

There are various ways in which competence of individual teachers can be recognised. Rebore (1991:249-250) suggest that competence can be recognised through intrinsic rewards which include:

- increased participation in decision-making;
- greater job discretion; and
- increased responsibility.

Another mode includes extrinsic rewards such as direct compensation ranging from performance related pay, leave to praise. Furthermore, recognition of competence

embraces mobility (promotion-vertical and horizontal), although empirical research reveals that it is implemented at a slow pace, and often not available. Mobility is influenced by variables such as performance, effort, seniority, skills and job requirements.

(a) Pre-service recognition

Recognition of competence does not only begin when an individual teacher enters teaching. It is also stretched to the selection process for teacher education and training. Hence the HSRC (1994:24) states that when selecting teacher trainees the following must be considered:

- General mental ability and differential aptitudes.
- Interests categorised into personality types.
- Attitudes towards study and education.
- Biographical information.

(b) In-service recognition

When teachers enter the teaching profession their performance can be enhanced if managers

- keep abreast of teacher activities;
- limit assignments for already overloaded teachers;
- relate rewards to professional achievements;
- recognise teachers' work frequently; and
- use many avenues of reward (Blasé & Blasé, 1994:109),

Very often managers are trapped in the inconsistent use of praise as a means to motivate and recognise competence of teachers. The following principles will help managers to maintain consistency in praising:

- Be specific about what you are praising.

- Acknowledge both the effort and the outcome.
- State the impact on you personally (Deeprise, 1994:16).

(c) Designing a reward system

On the whole, managers must develop a reward system that is workable for them and teachers. When designing the reward system the following components remain useful:

- A list of rewards for which teachers are eligible.
- Reward criteria : requirements for earning each reward.
- The process of selecting recipients.
- Identification of people who will select recipients.
- The process for presenting rewards.
- Accompanying ceremonies and celebrations (Deeprise, 1994:31).

**5.3.1.2 Guidelines for effective recognition**

(a) Overcome charges of favouritism and luck

When the reward criteria are unclear, employees will work out their own reasons why a co-worker earns a reward. When better information is not available, teachers often explain reward in terms of favouritism and luck. They often regard performing teachers as the principal's "pal and apple of the eye". To them reward comes through sheer luck not through hard work. The reward system can demotivate teachers if they cannot determine the connection between effort and reward (Deeprise, 1994:34). They may even believe that the criteria are known to a select group, from which they are excluded, which only undermines their sense of competence and self-esteem.

(b) Follow definitive criteria in rewarding

The values, behaviours and outcomes that are incompatible with the vision and mission of the organisation should not get rewarded. The criteria used should create an even

playing field so that all employees, whatever their functions, have an equal opportunity to meet the requirements for the reward. Hence the reward criteria should be based on:

- Customer satisfaction
- Work quality
- Problem solving
- Work quantity
- Setting and achieving objectives
- Improving work processes
- Attendance
- Acquiring new skills (Deeprrose, 1994:36)

(c) Set goals and objectives

Basing rewards on individual goals produces the most precise criteria. When individuals or teams are competing against a standard, not each other, there is a need to define standards for each of them to circumvent rivalry. Those standards should be measurable – that is, they must be fairly easy to achieve when the goal is quantifiable (Deeprrose, 1994:37).

According to Van der Horst & McDonald (1997:49-65) there should be a reward for critical cross-field outcomes which are quantifiable in forms of:

- Teachers being able to identify and solve problems by using critical and creative thinking skills.
- Teachers being able to work effectively with others as a member of a team, group, organisation of community.
- Teachers being able to manage themselves and their activities responsibly and effectively.
- Teachers being able to conduct investigations and do research.
- Teachers being able to communicate effectively using visual, mathematical and/or language skills in the modes of oral and/or written presentation.

- Teachers being able to use science and technology effectively and critically showing responsibility towards the environment and health of others.
- Teachers able to demonstrate an understanding of the work as a set of related systems by recognising that problem-solving contexts do not exist in isolation.

However, it must be emphasised that the reward system must recognise behaviour of teachers as well, although there are arguments that are counter to that. One of them is that recognition gives the impression of trying to control their behaviour rather than allowing them the right to choose their own methods of accomplishing their goals (Deeprouse, 1994:48).

(d) Treat the other people the way you would like to be treated

The golden mean of recognition of competence lies in the traditional saying that "one person's fish may be another's poison". The value of a reward is in the perception of the receiver. And what one person considers rewarding, another may find punishing. This requires managers to prioritise needs and use cost-effective means of recognition. Trethowan (1991:121) suggest that this is done by following aspects such as:

- First priority : the quality of present performance.
- Second priority : prospects for future performance and growth.
- Third priority : other skills which contribute to the planned development of the school.

The manager must give options, suggestions and must not cast in stone his/her intentions of rewarding competence.

To sum up, one can say that when people are recognised for their potential, their efforts, and their accomplishments, there is a high likelihood they will develop into employees who:

- Set challenging goals for themselves.
- Find innovative ways to meet those goals.

- Overcome setbacks, because they assume they can.
- Continually seek new opportunities.
- Enjoy responsibility and managing their own work.

Without recognition, it takes an unusually "thick skin" and an exceptional drive for an employee not to:

- Feel inadequate and resist changes.
- Stick with what's familiar and low-risk.
- Blame him/herself when things go wrong.
- Hide mistakes.
- Look for directions from others.

Recognition of competence is undertaken to engender self-esteem in teachers and in turn self-esteem could yield quality performance.

#### **5.3.1.3 Building a culture of recognition**

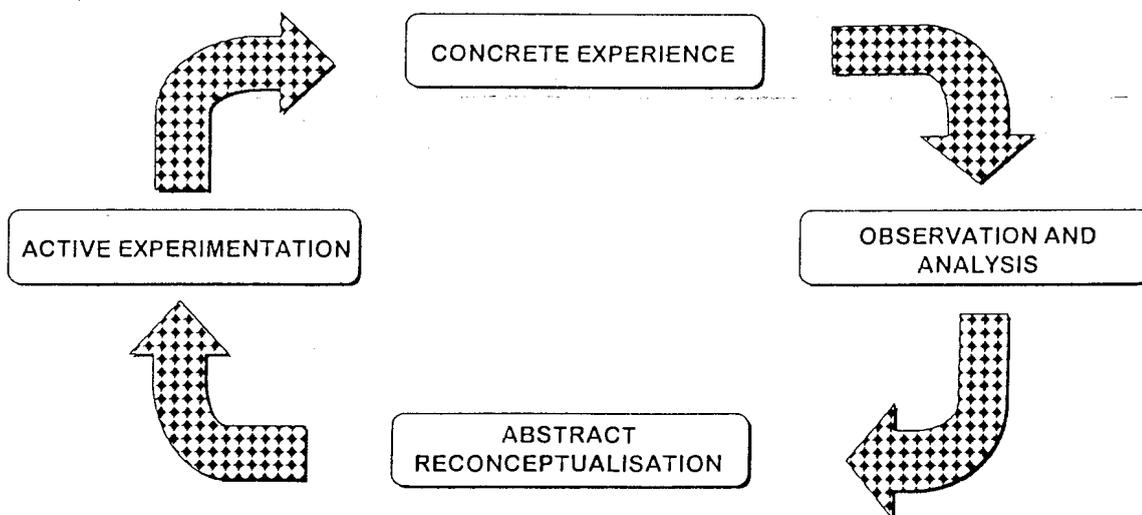
Although all the constructs discussed above are contributory to the culture of recognition in schools, one needs to point out the importance of culture in the recognition of competence. Culture is a belief system and value system that is an integral part of climate. Culture is therefore not diametrically opposed to climate. I shall discuss how climate can help in realising recognition at schools, but first let us look at how culture influences the recognition of competence.

A school culture is a composite of factors such as teacher commitment, student peer norms, co-operation, emphasis on academic standards, reward system, mutual trust and clear goals. As such, shared beliefs, expectations, values and norms of conduct of staff members (Hansen, 1996:58) play a critical role in the recognition of competence. The type of culture existing in schools determines the aspects of the activities of the school. Greenwood & Guant (1994:58) cite those aspects as:

- The purpose of education.
- The nature of education.
- The type of education.
- The delivery mechanism of that education.

Therefore, the school culture should engender commitment in staff members and harness their willingness to improve oneself continuously. A culture that encourages self-criticism will be founded on reflective practice (Osterman & Koltkamp, 1993:19). Reflective culture implies a relentless effort to gain a new level of insight into personal behaviour through dual stance, being, on the one hand, the actor in a drama and, on the other hand, the critic who sits in the audience watching and analysing the entire performance. To achieve this perspective individuals must come to an understanding of their own behaviour, they must develop conscious awareness of their own actions and effects and predispositions that shape their actions.

Figure 5.1 Experiential Learning Cycle



Source: Osterman & Kottkamp, 1993:19.

The success of recognition in this cycle begins with a problematic concrete experience, on unsettling situation that cannot be resolved using standard operating procedures. This is where the reflective practitioner steps back and observe (not acting but being critical audience) and analyse: What was the nature of the problem? What were my intentions? What did I do? What happened? In this analysis the problem will emerge. The problem in this regard will be a discrepancy between the real and ideal – and this further stimulates the inquiry and a move to the re-aim of theories. After this step, the manager will now establish strategies for recognition that are more consistent with espoused theories on motivation as stimulus for experimentation. In short, raising questions about practice begins a learning process that leads to behavioural change.

In this way recognition of competence will enhance individual teachers' competence to accomplish organisational goals, meeting norms and standards of the school. When culture is combined with social system factors such as social relationships between individuals, this creates a school climate. This is discussed below.

#### **5.3.1.4 School climate**

Recognition of competence takes place in a particular social context. School climate defines the social context of recognition. The school climate is what personality is to the individual (Open University, 1988:26). Sergiovanni & Starrat (1993:84) refers to school climate as the health of the school which includes the dimensions such as goal focus communication adequacy, optimal power equalisation, resource utilisation, cohesiveness, morale, innovativeness, autonomy, adaptation and problem solving adequacy. These are the attributes of recognition to establish a positive school climate for recognition of competence to succeed. This is possible if the following principles are adhered to:

- respect for adults;
- genuine participation in decision-making;
- interaction with peers which encourages innovation;

- a high sense of efficacy;
- opportunity to use and develop skills and knowledge;
- sufficient resources to support teacher experimentation; and
- reasonable congruence between the teacher's personal goals and the goals of the school in general.

There are two types of school climate – open and closed. Recognition of competence thrives in the former, not the latter. An open climate is the type of climate in which the principal listens and is open to teacher suggestions, gives genuine and frequent praise and respects professional competence of the staff. Teachers are accorded the freedom to act autonomously in their classrooms by providing facilitative leadership devoid of bureaucratic trivia. Teachers know each other well and are close personal friends (Calitz & Shube, 1992:31). This kind of climate is characterised by:

- shared goals;
- collaboration, collegiality and co-operation;
- teacher certainty;
- teacher commitment;
- learning and efficacy; and
- openness and mutual trust.

These attributes impact on the type of leadership required for recognition of competence. This shall be discussed below.

#### **5.3.1.5 Leadership for recognition of competence**

An open climate requires an open and democratic leadership where by decisions are not made in a vacuum (Shortt, 1994:45), but inputs from all stakeholders are considered including those of teachers (Blasé & Blasé, 1994:5). Any programme that is destined to succeed in education requires collegiality and co-operation. Hence the Task Team (1996:27) avers that leadership is about doing things and working with people to make

things happen. It is a process to which all contribute and in which everyone in an organisation ought to be involved.

Leaders in schools should encourage teachers to develop the necessary expertise to assume leadership roles such as staff developer, mentor, peer coach, etc. (Burke et al, 1990:64). And this is the object of recognition of competence : to facilitate and nurture leadership growth by exploring opportunities that exist in schools and to ultimately enhance the quality of education in general. Leadership of school principals should generate a sense of cheerfulness and self-confidence in teachers in order to attain the objectives of recognition of competence.

#### **5.3.1.6 Motivational factors**

Cheerfulness and self-confidence are the epitomies of high morale which is premised on teachers having a sense of confidence that they can succeed, and are respected by colleagues and the community. Self-confidence boost morale and ultimately leads to motivated staff. Morale relates to the way people think about their work – their feelings, thoughts and actions. When the needs and priorities of teachers are not recognised, their morale dwindles down (Open University, 1988:28). Hence it is critical that recognition (of competence) programmes are implemented to save schools from conflict, stress and frustration. Thus, high morale is a catalyst for motivation.

Motivation is discerned in teachers having a desire to do something and achieve in order to satisfy a need in a given environment. The need for recognition emanates from:

- A sense of belonging.
- A sense of achievement.
- A sense of appreciation.
- A sense of influence.
- A sense of ownership (Day et al, 1987:128).

In addition to satisfying these needs, which are directly linked to Maslow's Need Hierarchy theory, McGregor's theory X and Y, Herzberg's two-factor theory, McClelland's theory of self realisation and Vroom's expectations theory (Van der Westhuizen, 1991:195-202 & Schreuder et al, 1995:80-83).

These theories can be realistic if the following principles are taken care of:

- Participation-involving teachers in decision-making.
- Communication-informing staff of objectives and results achieved.
- Recognition – giving credit where it is due.
- Delegated authority – decentralisation (Van der Westhuizen, 1991:203).

Because motivation considers human behaviour and theories as well as outcomes, there is a need for the recognition of competence to combat low morale caused by over-supervision, too many rules and regulations governing personal and professional activity, poor human relations and inadequate working conditions. This requires empowerment and capacity building programmes. The following section discusses this.

### **5.3.2 Empowerment and capacity building**

#### **5.3.2.1 *Making democratic quality decisions***

Very often decision-making in schools is a problem and the empirical investigation concurs to this. Quality decision-making which empowers and builds capacity among teachers is based on principles such as:

- Consensus;
- Collaboration;
- shared decision-making; and
- participatory management.

Quality decision-making starts by arriving at collective opinion as a team or group of individuals working together under conditions that permit communication to be sufficiently open and the group climate to be sufficiently supportive for everyone in the group to feel that he or she has a fair chance to influence the decision. This may sound good but the question remains how to do it? McEwan (1997:6) points out that quality decision-making begins with knowing when to make that decision? What kind of decisions should be made and by whom?

(a) Premises of democratic quality decisions

In organisations quality decision-making requires:

- (i) Trust – whereby people can state their views and differences openly without fear of ridicule, or retaliation, or alienation and let others do the same.
- (ii) Support – people can get help from others on the team and give help without being concerned about hidden agendas.
- (iii) Communication – because of mutual trust, people can say what they feel.
- (iv) Team objectives – team objectives minimise conflicts and direct thinking to a common end.
- (v) Conflict resolution skills – people do not suppress conflicts or pretend they do not exist. Instead, they work through them openly.
- (vi) Utilisation of members – the individual abilities, knowledge, and experience of the team members are fully utilised.
- (vii) Control – everyone accepts the responsibility for keeping communication relevant and the team operation on track.
- (viii) Climate – the team climate is one of openness and respectfulness of individual differences.

(b) Methods

There are various methods of making democratic quality decisions. Among others, the following are important for empowerment and capacity building.

(i) Creativity with options such as:

- Brainstorming
- Nominal group technique
- Mind mapping
- Fault tree analysis
- The Kiva technique
- Idea writing (McEwan, 1997:68-80)

(ii) Sharing critical information through:

- Co-operative groups
- The gallery
- The symposium
- The panel discussion
- The interrogator hearing
- The dialogue
- The interview
- The lecture (McEwan, 1997:84-94)

(iii) Problem solving which include the following steps:

- Define the problem
- Identify the suspected causes
- Verify the most likely causes
- Identify possible solutions
- Determine the best solutions
- Develop an action plan to implement the best solutions
- Evaluate action plans (Lynch & Werner, 1992:160)

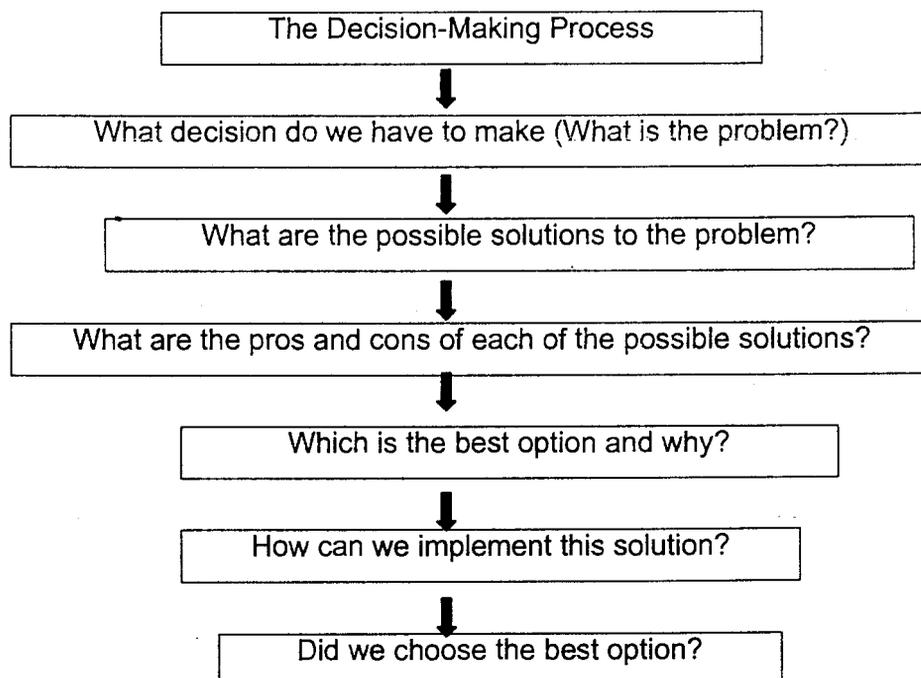
(iv) Achieving consensus which is manifested in:

- The Apollo method
- The Huddle method
- Vigilant analysis
- Second chance meeting
- Advocacy subgroups
- Ranking
- Parking lot meetings
- Diamonds nine
- Multivoting
- Scanning strategy
- Priority matrix (McEwan, 1997:113-138)

(c) The decision-making process

Whatever method is used quality democratic decision-making involves a process clearly illustrated by this figure:

**Figure 5.2 : The decision-making process**



Source: Department of Education, (1997:32).

This process can be summarised as agreements or reaching decisions by majority vote because:

- all members have a voice in decisions;
- differing views are heard;
- everyone supports that final decision; and
- a sense of common purpose is developed.

### **5.3.2.2 Competency-based development and training**

It appears there is a dire need for a competency-based development in education because management and teaching jobs seem very abstract and require a special approach. Development and training should aim at the capability of an individual which relates to superior performance in a role or job. It means that development should focus on knowledge, skill or intellectual strategy. The ultimate outcomes are:

- The employee's capacity to meet (or exceed) a job's requirements by producing the job outputs at an expected level of quality within the constraints of the organisation's internal and external environments (job competence).
- An employee who is able to exhibit high performance in a job in his or her motive, trait, skill, self-concept, social role and knowledge (job competency)(Dubois, 1993:9).

#### **(a) Addressing personnel issues**

Competency-based development is relevant in addressing personnel issues. For instance, it is common in education to select headmasters and other managers on the basis of their performance as teachers. These teachers are subject specialists and are not generally prepared for their task as managers. However, in rapidly transforming systems like ours, managers may not have adequate basic qualifications for the job. In most cases unqualified candidates are appointed because no minimum appointment criteria have been defined, selection policies are not rigorously applied or there are few

articulated career development policies. Therefore, competency-based development and training are critical to remedy poor performance (Department of Education, 1996:7). This kind of approach will furnish such candidates with the necessary skills, knowledge and attitudes that are critical to job requirements and performance.

The findings from the literature study and the empirical investigation have revealed that the tasks of education managers are often poorly defined in relation to school principals. There is often a lack of articulation among these cadres and this compounds the already declining culture of education.

(b) Competency-based development programmes

Guidelines for implementation of competency-based development should first consider individual teacher's needs and needs of the school. The needs must be prioritised and linked so as to come up with a general need that will address concerns of both the teacher and the school. Therefore, competency-based programmes are needs driven (Sheal, 1989:8), and are derived from:

- pressures in the classroom;
- ethos of well-being and caring;
- staff or curriculum meetings;
- shared philosophy, coherent strategy; and
- leadership activities (Hall, Wallace & Hill, 1991:2).

When needs are identified then there is a need to design learning events. Sheal (1989:32) contends that competency-based learning events should portray learning problems of employees, adjustments, organisational history and structure as well as policy. Although a situational approach is encouraged, Dubois (1993:166) finds that when designing learning events, there is a need to identify human capabilities on which instructional design must be based. This includes:

- (1) Intellectual skills
- (2) Cognitive strategies
- (3) Verbal information
- (4) Motor skills
- (5) Attitudes

Designing the learning event is done with a view to implementation. As such when implementing the learning event, it is important to consider the following principles:

- implementation is a process not an event;
- implementation is a process of clarification;
- interaction and technical assistance are essential;
- planning is the hallmark of this process; and
- plans must address three aspects of change such as
  - materials;
  - teaching or management approaches; and
  - innovation (Hall et al, 1991:8).

A good design or programme should be:

- systematic, regular, reliable;
- flexible with regard to modes of delivery;
- demand-led, taking account of identified needs of managers and teachers;
- situation specific;
- designed to provide a variety of opportunities for self-development;
- able to generate material appropriate to training strategies;
- viable and sustainable;
- proactive rather than reactive; and
- accountable (Department of Education, 1996:7).

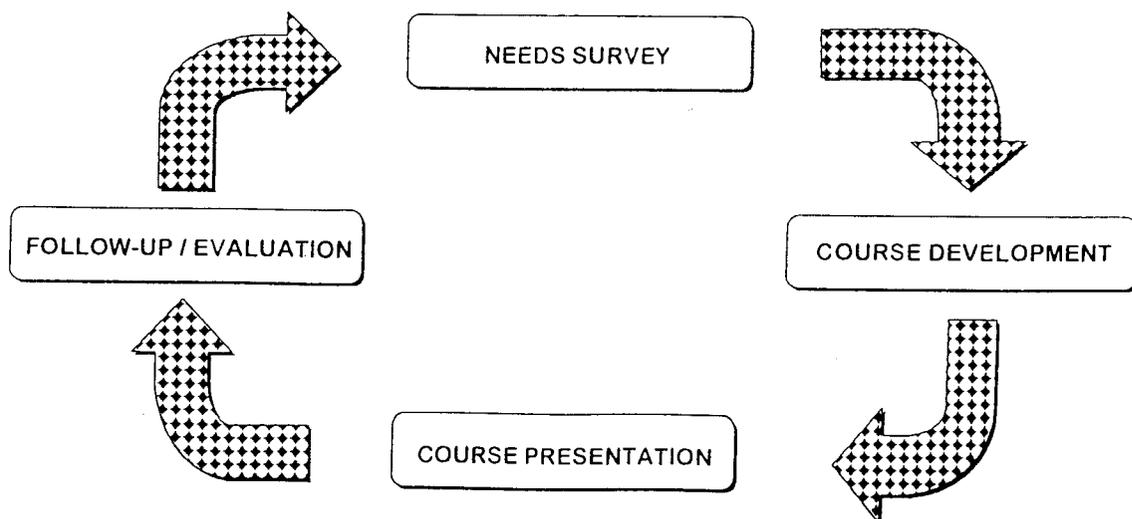
In addition to the above requirements, there are other caveats that are important to the success of development programmes. For instance, the developer should complete an in-depth analysis of the characteristics of the learners; confirm and preliminarily organise the competencies to be included (such as those mentioned above); identify subordinate competencies for each principal competency; elaborate the competencies as learner performance objectives; design and develop intervention learning plan and pilot the programme for redesign and reformulation (Dubois, 1993:158).

Finally, it must be emphasised that the programmes must place major learning emphasis on the competency, on how it relates to achieving job outputs; must actively involve the learner and make the learner responsible for achievement at all stages of the learning intervention; and should include highly visible opportunities for learners to gain insight into the problem of transference of competency acquisition to its application on the job.

(c) Competency-based curriculum

A competency-based curriculum is one whose content specifications are defined in competence terms and is consistent with job competency. It consists of a system of performance improvement opportunities such as preservice training courses, induction, in-service and learning programmes. It is a continuous process which is clearly defined as a development cycle as shown in the figure below.

Figure 5.3: Development cycle



Development should be seen as a continuous process. It means that teachers should be learners and should be continuously refining their skills (Caldwell, 1989:86). Development should move in a co-ordinated manner and usually begin with needs analysis which is done by a way of a survey – a questionnaire. The survey will inform the preparation. That is to say that learning events should be drawn from the needs. In that way development will be context sensitive by paying attention to teachers' needs (Wideen & Andrews, 1987:34). The teachers' needs should be clearly reflected in the curriculum.

When designing the course or curriculum it is important that the following technical aspects are given due regard:

- deadline – that is a date and planning time schedule for the learning event;
- objectives – distinguish between teaching and learning outcomes;
- materials for learning and teaching;
- learning and teaching methods; and
- time for feedback and review (Sheal, 1989:71).

These aspects will help improve the course presentation. The presentation can take many forms including face-to-face (contact sessions) learning, distance or open learning. The contact learning sessions should proceed in a linear form through steps such as:

1. Announce the title of the course.
2. Introduce yourself – name, background and profile.
3. Introduce the course briefly.
4. Introduce and clarify objectives.
5. Facilitate learning activities.
6. Summarise.
7. Feedback (Sheal, 1989:8).

These steps do not preclude individual creativity. The presenter has the liberty to use situational training techniques that consider individuality of the learner and contextual circumstances. Situations and individuals differ hence it is necessary that the presenter must ensure that whatever method or technique chosen he or she:

- links the participant's pre-knowledge with new knowledge;
- presents relevant, concise and brief information; and
- uses his or her experience and knowledge to overcome deadlocks and arguments during the presentation (Broadwell, 1995:105).

At the end of this process there should be evaluation and planning for a follow up. Evaluation is critical for accountability and quality assurance. Evaluation would seem to be a prominent feature in this period of transformation where more talk is on rationalisation, consolidation and cost-effectiveness. Education managers require hard facts about the effectiveness of training, evidence of past success and value for money. It is on the basis of evaluation that follow up is planned to give remedial sessions to learners who still exhibit problems, and the shortcomings of the programme are addressed with view to improvement.

Sometimes it is possible that the needs survey may point to diverse needs. In that case the developer narrows the scope in order to produce the most accurate and comprehensive curriculum architecture. When this approach is used, what will result is either several smaller curriculum architectures (or plans), each with a limited scope, or a larger, broad-based curriculum plan that can be modularised or individualised for each sub-group of the target audience (Dubois, 1993:128).

#### (d) Adult learning principles

Likewise, learning interventions should take a critical consideration of adult learning principles because it is teachers, who are adults, who are going to be involved, and the fact that learning takes place more readily in some circumstances than in others as well as the reality that adult learning theory and child learning theories are different, calls for a need for different planning, approach, content and method.

For this reason, Mohlakwana (1996:62) and Sheal (1989:13) agree that competency-based development, as it is intended for adult learners, should be based upon the following adult learning principles:

Adults learn better:

- In an informal non-threatening learning-environment.
- When they want or need to learn something.
- When their individual learning needs and learning styles are catered for.
- When their previous knowledge and experience are valued and used.
- Where there's an opportunity for them to have some control over the learning content and activities.
- Through active mental and physical participation in the learning activities.
- When sufficient time is provided for the assimilation of new information, practice of new skills or development of new attitudes.
- When they have opportunities to successfully practice or apply what they have learnt.
- When there is a focus on relevant and realistic problems and the practical application of learning.
- When there is guidance and some measure of performance so that learners have a sense of progress towards their goals.

Competency-based development should resonate with adult learning preferences which include:

- Rejection of prescriptions from others for their learning's;
- Highly ego-involved learning;
- Frequent and accurate feedback about progress made;
- Realistic and related goals;
- Originality in knowledge production;
- A link with pre-knowledge comprising of competencies, skills and attitudes (Reavis & Griffith, 1992:166).

It is crucial to note that competency-based development requires consideration of what the teacher thinks about teaching, the need for benefit, flexibility for accelerated skill acquisition, that enthusiasm may wane off and that development does not promise immediate effectiveness. However, these basic tenets are necessary for long term achievement and maintenance of quality education.

(e) Job competence developmental assessment

Competency-based development has an element of performance management and relies on the use of a rigorous, empirical research procedure to determine job competencies that differentiate exemplary from average job performance. Dubois (1993:321) states that exemplary teachers and average performers are interviewed about the dimensions of their job performance. Once the competencies are determined, they in conjunction with other job elements, are used to construct a job competency model.

That is to say that competency-based development, as a component of the competency model for human resources development, requires that teachers exhibit exemplary job performance within their own context of job roles, responsibilities and relationships in an organisation, its internal and external environments. This model is directly linked to recruitment and selection in that it addresses the problem of how to hire and train people for maximum effectiveness. By pinpointing the key knowledge, abilities, and other personal characteristics needed to do a job well, job competence developmental assessment departs dramatically from classical job analysis (Klemp, 1982:55). It starts with a simple premise : the best way to find out what it takes to do a job is to analyse the job's outstanding performers and then to study what they do that makes them so effective. Therefore, job competence developmental assessment is not so much about assessment of the job as but assessment of the person who does the job. This model is expounded in the following steps:

(i) Researching the job components and the requirements for exemplary job performance

This step involves the research process which aims at determining and documenting the job components. The process begins with the formation of focus group – persons who are job experts. Then, key players in the organisation are involved. The credibility of this process is enhanced by including either the principal, deputy principal or head of department or even a peer (Day et al, 1988:8). The focus group should document technical job knowledge which is characteristic of high performers.

The estimates of high performers would include attributes that modifies an individual's choice of action with regard to objects, persons, or events (attitudes) and principal competencies critical for successful job performance for a given job at a given level in an organisation hierarchy (core competence). This directly links with the second step.

(ii) Researching the attributes of exemplary performers

The second step involves an approach of job observations that can be used to ascertain the immediate job context and the work environment in which employees perform day-to-day duties. The observer's objective is to detect an overall sense of the work, climate, the style of interaction, and the actual job tasks and activities. However, job observations are used only when they will significantly contribute to, or supply information needed for, the construction of the competency model (Dubois, 1993:76).

There is a need for critical behaviour interviews – which should be varied and conducted by trained interviewers. The interview should be recorded with permission of the interviewee. Confidentiality guidelines are established with both the employee and the employer. Both the exemplary and the average performing teachers are interviewed. In this way attributes of excellent performers are arrived at through questioning and descriptions of events or situations. The ultimate outcomes of this activity are:

- Competencies held by only the exemplary performers.
- Competencies held by both the exemplary and the average performers.

The latter are the minimum job competencies, while the former distinguished the exemplary from the average job performer and are used to build the competency model. The final report must include the job outputs and the job tasks and activities engaged in the process.

(iii) Validate the job competency model

This is the final step whereby an attempt is made to validate the model and gain credibility. Competency model that is used for the recognition of competence (empowerment and capacity building) must have a high validity (Dubois, 1993:80). Its validity is enhanced when the model is consistent with democratic values such as:

- human dignity;
- non-racialism and non-sexism;
- transparency and accountability;
- fairness, non-discrimination and equal treatment;
- development-oriented; and
- representivity (Constitution of the Republic of South Africa, 1996 section 195; Rautenbach & Malherbe, 1998:61; ANC, 1995:4)

Finally, the use of this model will be advantageous to the incumbent developer in that competency model:

- analyses jobs whose performance dimensions and attributes are difficult to observe and define;
- can be applied to a wide variety of jobs;
- is criterion referenced (i.e. relative to what the exemplary performers do) rather than norm-referenced (i.e. relative to what all teachers who hold the job do);
- investigates the internal realities of a job;
- identifies the affective attributes required for successful job performance; and

- produces competency models that can be used immediately to create training or education opportunities that emphasise exemplary performance by teachers (Dubois, 1993:82).

### **5.3.2.3 Strategies for competency based development**

The strategies are formative, career orientated and are an excellent way of enhancing the skills, attitudes and abilities of teachers so that they can remain in the job market and perform better. The idea of competency-based development, geared towards job efficiency and success, is derived from focussed elements of teacher development which include:

- Imaginative intelligence : whereby teachers are able to critically analyse work-related problems, to provide creative solutions and to engage in entrepreneurial thinking.
- Emotional maturity : enables teachers to cope with job stress.
- Effective communication skills : help teachers to write and speak well and to convey new ideas and insights intelligibly and convincingly.
- Thoughtful accuracy : embodies aspects of teachers being able to work fast and to detect and rectify errors.
- Interpersonal sensitivity : includes attributes of teachers being able to work with people, tolerate cultural and other diversities in the work environment and to contribute to an atmosphere of teamwork.

#### **(i) Contact sessions**

There is a considerable number of contact sessions strategies available to the competency developer. These are strategies in which the developer comes into contact with the learner. They are:

- Observation
- Peer-mediated learning
- Role play

- Modelling
- Laboratory
- Clinic
- Discussion
- Group work
- Workshop seminar
- Demonstration session
- Mock-up (Dubois, 1993:206-208)

(ii) Self-directed learning

Competency-based education and training may also include the use of self-directed learning strategies such as:

- Reading
- Computer-assisted learning
- Interactive video disc packages
- Distance learning
- Programmed instruction
- Projects and assignments
- Tutorials
- Contract-based learning
- Annotated reading lists, bibliographies
- Study guides
- Public library research

(iii) Off-site strategies

Development may take a form of an off-site learning whereby a learner is taken to

- Visits on learning sites
- Excursions
- Conferences
- Workshops
- Seminars
- Camping
- Field trips
- Travel
- Teacher exchanges
- Institutes (Davis et al, 1996:13)

(iv) Optical technology

This strategy involves the use of optical technology based on the hardware's capability for storing and retrieving very large amounts of data. The forms of optical technology contemplated for empowerment and capacity building include:

- Compact disc read-only memory (CD-ROM) technology.
- Interactive videodisc (IVD) technology.
- Digital video-interactive (DVI) technology.
- Compact disc-interactive (CD-I) technology (Hannum, 1990:47).

Although human resources managers may find it difficult to use emerging training technologies because it develops at a faster pace, technology remain significant and important for competency-based development.

(v) Communications technology

This often referred to as conferencing and may take the form of satellite or broadcast television and telephone lines (Hannum, 1990:19). The most useful one's are:

- Asynchronous computer conferencing

- One-way video teleconferencing
- Two-way digital teleconferencing

Furthermore, competency-based development can be enhanced by instant and accurate communication systems such as electronic mail, voice mail, fax, GroupWare, telecommuting, electronic data interchange, etc. (Shelly, Cashman, Waggoner & Waggoner, 1995:71). Whatever strategy used, its success will be determined by connectivity for quick and direct accessibility.

(vi) Group strategies

These strategies are relevant for those who prefer to work in groups and teams. Among others they include:

- Workshops
- Staff meetings
- Committee work
- Team teaching
- Mentoring, coaching
- Seminars
- Professional association work
- Community organisation work
- Group discussions (Davis et al, 1996:13; Rebore, 1991:168)

These strategies should be used with consideration of other methods which cater for individual abilities. In other words the individual's talents should be enmeshed within the group. Self-actualisation will make each group effective.

#### **5.3.2.4 Power sharing guidelines**

Research findings reveal that there is a misconception of power as if it were only an attribute of a person or a select group – with teachers complaining of being powerless and managers seeing themselves as the seat of power. It must be noted that the brief of

this project is to investigate power relations in schools and suggest ways of sharing it. Therefore, power should not be seen as a commodity, an agency over others, the ability to stop the activity (Lee, 1999:245), but rather we should see power as relational, always consisting of interaction and therefore, never one-sided or unilateral (Richmond & McCroskey, 1992:8).

The aim of the researcher in this section is to suggest ways and means of sharing power without losing it through the following:

The success of partnerships, teams or networks depends on the recognition of each partner as an equal member with a well defined role. Each partner should focus on his or her core strengths and utilise the strength of the other partner to overcome threats and weaknesses. In this way new opportunities will be maximised for the benefit of all partners. In terms of Die Tukkies (1999:2) this demands a creative approach to working much more closer together by allowing for a win-win approach. This approach will synergise individual talents and draw from a pool of expertise the rudiments required for the survival of the organisation.

Each member must accept responsibility concerning the organisation and programmes executed. This is possible when there is:

- mutual trust and respect;
- shared decision-making;
- shared goals and values;
- common vision;
- open communication;
- teamwork spirit; and
- respect for the roles of different partners (Potgieter et al, 1997:8).

It should be noted that partners who are in the education business equally share both the risks and profits. Should there be "loss" all should endure the plight. No one is exonerated. Likewise, when profits are bigger there should be equal share or equitable

share. It means that partners should expect to gain by working together. Hence it is necessary to set standards for accountability so that each partner knows the extent and level of his or her responsibility.

Furthermore, there is a need to distinguish the type of a partnership one may be involved in. Karlsson (1998:38-39) identifies the following types of partnerships:

- Informal partnerships – are ad hoc structures-based on loose agreement.
- Post-agreement formalised partnerships – requires tendering procedures and formal agreements.
- Formal partnerships – evident in form of non-state organisations/agencies for example, Hunter Committee, Ministerial Task Teams, UP-CSIR, etc.
- Statutory partnerships – based on legislative provisions, e.g. Heads of Education Committee, the Education Council, School Governing Body, etc.

Partnership can be configured in various ways including bipartite agreements involving the government and non-governmental agency; multi-agency between government, an NGO and the private sector; multi-level partnerships in which multi-agency agreements operate at more than one level and may involve substructures. Practically, these guidelines can be translated into a situation whereby teachers in a particular school establish a team, or form partnership with an NGO to share expertise. Partnerships between schools or departments are possible whereby teachers of a model school share skills and knowledge with the other partner.

In the same vein, it must be noted that, although institutions have latitude to establish partnerships, institutions are not the same. Therefore, the challenge facing partners will be how to manage diversity? Harris & Myers (1996:8-9) cautions partners to go beyond stereotypes and prejudices and value diversity as the strength to build on partnerships. Dealing with a diverse team (collection of people) requires special knowledge and sensitivity. People from different cultures, religious backgrounds, ethnic groups, etc., have values and beliefs that may make a significant difference, especially in a team

setting. Acknowledging that differences do exist and using them to your team's advantage will make partnerships more effective.

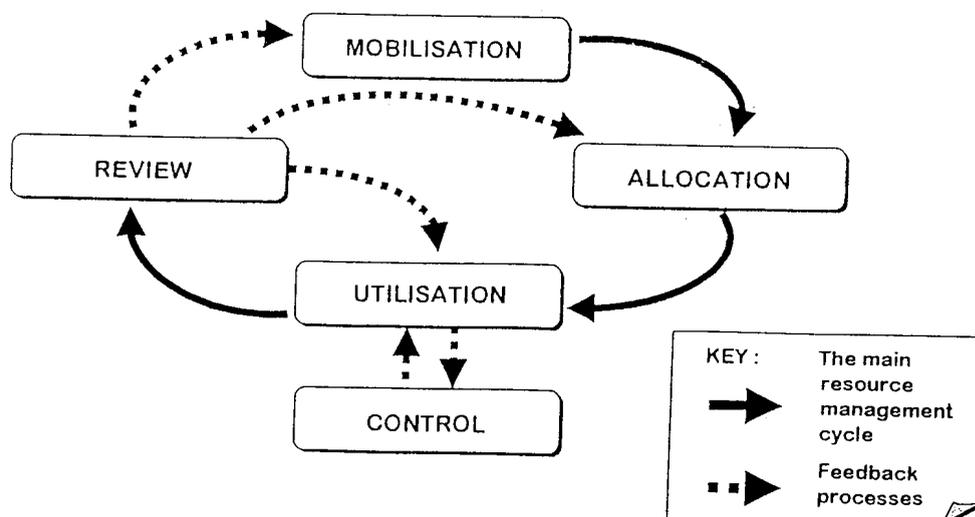
### 5.3.2.5 *Managing resources equitably*

The challenge of empowerment and capacity building will remain a daunting task to management especially in this era of budget cuts. Therefore, it is important that managers manage resource effectively. These resources include:

- People-teachers, ancillary staff and learners.
- Equipment and consumable materials.
- Space – buildings and land.

The ultimate purpose of resource management in schools is to ensure that these resources are appropriately deployed and utilised in the delivery of educational experiences to pupils. This task involves everybody in the school, including senior managers, other teachers, learners and parents (Open University, 1988:8). The following figure (resource management activities) clearly give guidelines as to how to manage resources.

**Figure: 5.4: The Resource Management Cycle**



Source: Open University, (1988:10)

Mobilisation involves identifying and providing all those resources which may contribute to the school's performance. Although the move towards site-based management promise to empower schools, the availability of resources is still determined outside the school's boundaries. However, schools can mobilise resources from different sources. It means that school managers should become entrepreneurial in mobilising additional resources because the state cannot do everything for schools. Every partner should go all out to raise resources for the school.

When funds are raised, resources should be made available through allocation. This step begins with consideration of requisitions made by teachers as they are people closest to the learners. Allocation is done according to requisitions from teachers, convenors of different extra-curricular activities and leaders of ancillary staff. Practically, allocation is related to budgeting whereby various activities are slotted and allocated equitably according to the need.

The allocated resources should be utilised efficiently according to the mission of the school. Utilisation refers to translation of real resources into activities (Open University, 1988:9). The example is when the teacher uses teaching media in the classroom or when learners play rugby. However, utilisation of school resources should be controlled. This involves recording the taking-in and –out of a particular equipment or instrument and managing straying resources as well as guaranteeing its effectiveness in use. Thus inventories of resources need to be regularly taken to ensure that stocks are adequately maintained, and patterns of spending need to be monitored to ensure that they are in line with budgetary allocations.

Finally, performance has to be reviewed to assess how well resources have been utilised. This entails tackling fundamental questions concerning the degree to which particular resources have contributed to the quality of curricular and other provisions of the school. Such a feedback facilitates accountability. And strategies and plans for prospective development can be derived from this activity.

### 5.3.2.6 *Affirmative action*

Affirmative action should be regarded as the additional corrective step which must be taken in order that those who have been historically disadvantaged by unfair discrimination are able to derive full benefit from an equitable employment environment. Affirmative action is an integral part of equality rights, a logical extension of the right to non-discrimination (Beckmann, Bray, Maile, Foster & Smith, 1999:73). Although there are serious criticisms levelled against affirmative action, it is necessary for managers to understand that there is no piece of production that cannot be criticised. However, merely because a programme is called an affirmative action programme should never be conclusive of its validity for it must always be asked:

- Is the programme aimed at disadvantaged individuals or groups (designated groups)?
- Is the programme truly ameliorative?
- Is it reasonable in that it is not grossly unfair to others?

If the answer is yes to all these questions, then the programme can fully qualify as a genuine affirmative action programme. Affirmative action programmes should meet the following criteria, namely, they should:

- be directed to achieving equity for a group which has been the subject of past discrimination;
- be proportional to the goals being pursued; and
- not unreasonably prejudicial to those not embraced by it.

#### (i) Affirmative action principles

Although the adverse effects of affirmative action persist, it can be implemented with minimal discrimination when the following principles are considered:

- **Communication:** The purpose of affirmative action policies and programmes must be fully communicated to all parties.
- **Participation:** Affirmative action programmes must be developed with the active participation of all employees at all levels, and with representatives of organised labour.
- **Transparency:** Affirmative action programmes and practices must be open to scrutiny within and outside education, within reasonable limits.
- **Accountability:** All managers must be responsible in driving the process of affirmative action, but the top management should be accountable for its delivery.
- **Reasonable accommodation:** Affirmative action programmes must strive to eradicate barriers to employment and advancement in the physical and organisational environment and provide support of all members of the target groups.
- **Relative disadvantage:** Affirmative action must take into account the relative disadvantages status of groups, their needs within the target group and the needs of the organisation (Beckmann, et al, 1999:75).

(ii) Mechanism to correct imbalances

What managers must acknowledge is that affirmative action is now an integral part of the recruitment and selection process for all posts. Thus, in the hiring and appointment of employees, due regard must be made for the need to redress the injustices of the past and the need for representativity. However, the programmes envisaged for redress must advance suitably qualified persons by ensuring that such persons are considered on the basis of agreed upon criteria that is congruent to fundamental rights. To achieve this, the following mechanisms suggested by Schreiner (1996:85-88) may be useful:

- **Quotas** – are often equated to numerical goals in terms of which the employer may set staffing targets in terms of numbers or percentages that should be held by members of target groups.
- **Mandated representation** – is a strategy whereby organised employees elect representatives to serve on structures in an organisation. This calls for open

negotiation of recruitment and selection policies so as to harness union initiatives where possible.

- Targets – is another way of using a quota system but in contrast it is not an absolute approach like quotas which stipulate that no hiring of non-target group of persons may take place until the number of target group of employees attains a specified quota.

It must be kept in mind that when reviewing policies and practices, the concern should be whether they are necessary, not merely convenient. The duty of accommodation requires employers to be prepared to make sacrifices in adapting their policies and practices to facilitate employment equity.

(iii) Employment equity plan

In the same vein, there should be an employment equity plan which is practical, realistic, measurable and specific to each of the three designated groups. In other words, the equity plan must be designed to achieve reasonable progress towards employment equity in the employer's workforce. According to Beckmann et al (1999:92) the plan must specify:

- annual objectives for the life of the plan;
- the affirmative action measures to be implemented;
- where under-representation of people from designated groups has been identified by the analysis, numerical goals to achieve equitable representation of suitably qualified persons from under-represented designated groups which each category and level in the workforce; including:
  - the timetable within which these numerical goals are to be attained;
  - the strategies to be implemented to attain these numerical goals;
  - the annual timetable for the attainment of all other goals and objectives established;
  - the duration of the plan;

- the procedures to be used in monitoring and evaluating the plan to determine whether reasonable progress is being made in attaining employment equity; and
- the persons in the workforce responsible for monitoring and implementing the plan.

In conclusion one can say that recognition of competence is an imperative of human resource development which is fundamental to transformation in education. It facilitates worker growth and improvement of the standard of education. The guidelines and strategies outlined above are suggested to address the challenges posed by transformation in education. And recognition of competence also addresses retention in that the suggested strategies are aimed at committing teachers to lifelong learning – thereby regularly refining their skills so as to make them employable and mobile in their careers. Further retention strategies are suggested below.

### **5.3.3 Retention guidelines**

Retention embodies a system designed to provide educators with continuing employment during efficient service and establishes an orderly procedure to be followed before services are terminated. Retention is also referred to as tenure or permanent employment. There is a misconception that local school governing bodies have no authority to make changes affecting persons who have gained tenure status. It does not mean that the school governing body cannot, for example, transfer a teacher from one school to another as long as the act of transfer is not arbitrary. Permanent employment does not mean an absolute absence of change in conditions of employment. If this were so, managers would be powerless to cope with day-to-day personnel problems with which they are confronted. Thus, the purpose of this section is to outline guidelines on how to deal with retention of teachers for reasons ranging from motivation, protection, academic freedom, job security, staff stability to execution of rights. In the light of these reasons the researcher suggests the following guidelines.

### **5.3.3.1 *The probationary period***

The acquisition of a permanent status by educators represents long-term commitments in administrative judgement, public trust, and budget appropriations. The probationary period is important in the retention process. Its importance emanates from how an individual teacher acquires tenure.

Firstly probation has to do with assessment of the individual – his or her competency and potential as well as his or her ability to serve future staff needs of the school. Secondly it validates the recruitment and selection process. It provides an opportunity to determine the degree to which the original choice has conformed to expectations (Castetter, 1992:453). Lastly, the probation period provide for selective elimination, permitting the organisation to employ on a permanent basis only those who have attained the excellence required for such appointments.

Measures to be taken by the organisation during the probationary period to ensure a capable and stable teaching corps include:

- Consistent attention to induction and development of the probationer.
- Provision of funds for continuing staff development programmes.
- Consistent appraisal of and counselling with probationary personnel.
- Continuity in the selection process until the probationer attains the satisfactory level of excellence (Castetter, 1992:454).

Currently, the conventional practise with regard to probation implies an automatic attainment of tenure because in practise there is no developmental assessment to gauge and develop incumbents. After completion of twelve months the incumbents receive tenure of employment. This must be reviewed to save the taxpayer's money and enhance the accountability of the whole system. This practice waste time, money, management effort and educational opportunities incurred through admission of unsatisfactory personnel in the profession. Opportunities to minimise such errors of

judgement are available in the recruitment, selection, appraisal and development processes.

### **5.3.3.2 *The tenure privilege***

After successful fulfilment of the probationary period, the individual educator is assured continuing employment (permanent status). In return for the tenure privilege, all tenured personnel are expected to assume certain obligations, such as adherence to the code of ethics, rules and regulations governing his or her employment. The notion of professionalism invokes the requirements set by South African Council for Educators (SACE) such as:

- acknowledging the noble calling of their profession to educate and train the learners of our country;
- acknowledging that the attitude, dedication, self-discipline, ideals, training and conduct of the teaching profession determine the quality of education;
- upholding and promoting basic human rights as embodied in the Constitution of South Africa;
- committing themselves to do all within their power, in the exercising of the professional duties, to act in accordance with ideals of the profession, as expressed in the SACE code; and
- act in a proper and becoming way such that their behaviour does not bring the teaching profession into disrepute.

Therefore, it must be established that tenure is not a right but a privilege accorded to individuals on the basis of satisfactory compliance to set standards and norms. Education cannot harbour teachers who constantly contravene rules and regulations of the profession. Although the teacher is accorded academic freedom, the employer has the right to exercise control over the activities of the employee, and even to alter the contract of employment. However, the employee has the right of recourse to due process of the law.

The tenure privilege creates some expectations on both the teacher and the employer. These expectations include how much work is to be performed for how much pay and the pattern of rights, privileges and obligations between the individual and the organisation. The organisation enforces its view of the contract through authority. The individual enforces his or her views of the contract through upward influence, whether as a free agent or as a member of the union (Castetter, 1992:455). Thus, the process of tenure has an element of reciprocity. It assumes that the organisation will protect employment security of personnel who in return must fulfil obligations attending the service for which they are employed. However, there are some constraints that militates against tenure such as:

- Decline in enrolments.
- Curricular – changes.
- Financial constraints.

Therefore, the tenure privilege may eventually be revoked under circumstances beyond the organisation's competence and control. But still the due process of the law must be adhered to.

#### **5.3.3.3 *Bilateral agreements with unions***

Unions stand to play a role in the retention of excellent teachers. Hence Hassen & Naidoo (1999:8) find that:

"Not long ago the government agreed with unions to conduct skills and service delivery audits to match resources and guide effective transformation restructuring. These audits represented an opportunity for the state and unions to develop a staffing framework to ensure [retention]".

This initiative represent a right step in the democratic process of retention whereby unions are recognised as partners in staffing where there is an acute shortage, and in reduction where there is overstaffing. The involvement of unions comes as a result of consideration of the fact that unions stand to protect workers against arbitrary and

controversial staffing decisions by management. Trade unions will not allow the situation whereby their members are trampled to prevail. They seek to improve the conditions of work of their members (Wood, 1998:7). Moreover, the employer has the duty to consult in cases of transfer, redeployment or dismissal in terms of labour legislation.

At organisational level managers should consult with site-stewards because these union officials often have a far better idea as to what workers actually want (Wood, 1998:113). Site-stewards are vibrant communication links with the entire workforce because they are in everyday contact with their peers in the workplace, and generally have a good idea of workers complaints. If managers are to win the attitude of the workers they must use the services of site-stewards over and above bargaining councils such as the Education Labour Relations Council (ELRC) and the Public Service Co-ordinating Bargaining Council (PSCBC). This is because an outsider may not have the necessary information required at that particular context. However, a word of caution to this approach is that the trade union will generally seek to make this relationship formal. Nevertheless, good relations with unions will help establish order and harmony in the long-term (Nel, Erasmus & Swanepoel, 1993:64; Rautenbach, 1994:70-71).

Stability is a precondition for education to take place. Disregarding unions will only deepen the crisis. Retention of staff should be carried out in a win-win situation whereby all stakeholders receive sufficient recognition. Whilst it is necessary for unions to be involved, provincial departments who are saddled with the responsibility of retention must improve their programmes. In the same vein, the role of the provinces in retention of teachers will be discussed below.

#### **5.3.3.4 Provincial budget reviews**

Retention of teachers depends on budgetary constraints. The paradox with budgetary constraints is that provinces have to cater for staffing whereas they also have to provide for other basic education resources such as text books and classrooms. As a result provinces overspend. Donaldson (1998:35) alludes this overspending to the fact that personnel spending exceeded 92% of provincial education budgets. This is undoubtedly

too high, and glaring disparities emanating from the legacy of apartheid continue to plague education.

However, by alluding to high percentages on personnel spending one does not downplay the value of our dedicated and committed teaching corps. On the contrary, it is to recognise that the effectiveness of teachers in the classroom is undermined at present by inadequate supportive resources and facilities. Sustainable retention of educators requires provincial education departments to plan and budget for the costs of personnel provision, promotions, annual salary adjustments and all staff benefits, including training, leave and substitute staff. Provinces should refrain from using overdraft facilities thereby overspending because of:

- Unfunded mandates – whereby provinces are often forced to take on new responsibilities without receiving money to finance such programmes.
- Constraints on provincial flexibility – social security payments and salary expenditure are not under provincial control. Civil servants' wages are determined by centralised wage bargaining. Provincial capacity to respond to over-expenditure is limited.
- Budget gains to increase revenue. Up to the 1997/8 financial year, provinces under-budgeted for national priority areas such as health, welfare and education, hoping that the national government will bail them out when they ran out of money.

Therefore, it is important for provinces to address this problem through the following measures:

- improving financial management;
- improved budget practice;
- regular reporting;
- improved expenditure control; and
- improved expenditure management.

The provincial budget should embrace personnel management which embodies teachers' conditions of service, career planning, performance assessment, development and staff mobility.

#### **5.3.3.5 Local appointments**

Local initiative are not precluded in the process of retention. For instance, in accordance with section 20(4) of South African Schools Act, 1996 a public school may establish posts for educators and employ educators additional to the establishment determined by the MEC in terms of section 3(1) of the Employment of Educators Act of 1998 (Beckman et al, 1999:63). Those schools which can afford may retain their staff through this type of appointment. This will depend on the availability of the necessary funds to sustain and maintain such posts. However, efforts should be made to improve such appointees' conditions of service.

#### **5.3.3.6 Redeployment**

Redeployment is another way of saving teaching jobs (retention) and bring equity to uneven education human resources (Garson, 1999:4). This process involves reshuffling and reassignment of teachers to needy areas. In legal terms it is referred to as transfer for operational requirements which is based on:

- change in pupil enrolment;
- curriculum changes within a specific education institution;
- change to the grading of the specific education institution; and
- financial restraints.

Because this process involves jobs it is necessary to involve unions. Studies conducted by Jayiya (1999:8) reveal that in the recent past there has been more strikes in provinces against redeployment. Therefore, redeployment should be implemented according to collective agreements (ELRC resolutions) which will give unions an

opportunity to have a say in its implementation. This is to ensure that teachers' rights are safeguarded (Nxesi, 1997:32). It should be implemented according to specific procedures laid in collective agreements. For instance, according to ELRC Resolution 6 of 1998 the following procedure shall apply:

- (a) Procedure for transfer on operational requirements
  - (i) All vacancies that arise at educational institutions must be offered to serving educators displaced as a result of operational requirements of that PED as a first step.
  - (ii) All vacancies must be advertised and filled in terms of the prescriptions set out for the advertising and filling of educator posts, provided that:
    - every attempt is made to accommodate serving educators, displaced as a result of operational requirements, in suitable vacant posts at educational institutions or offices; and
    - a PED may publish a closed vacancy list (i.e. the priority list). In such event, the procedures contained in the resolution dealing with the rationalisation and redeployment of educators in the provisioning of educator posts shall apply.
  - (iii) When a school governing body (SGB) exercises its function in terms of section 20(1)(l) of SASA and Chapter 3 of Employment of Educators' Act, 1998, it must accommodate the obligations of the employer towards serving educators (i.e. choose educators from the priority list); the SGB must also take into account the requirements for appointment as determined by the Minister of Education and/or the requirements of the post as determined the Head of PED.
  - (iv) All applicants, who are serving educators, displaced as a result of operational requirements and who are suitable candidates for a vacant post in an education institution or office, must be short-listed.

(v) At historically disadvantaged institutions (institutions that fell under control of ex-Department of Education and Training, Homeland Governments and TBVC States), any educator who acted for longer than 2 continuous years in the post, at the institution, must be included in the interviews for the post, provided that:

- the educator is currently in the post;
- the post is part of post establishment of that institution;
- the relevant PED had approved the appointment; and
- the educator must have applied for the post.

These procedures apply in all cases of reassignment or transfer on operational requirements. There is a specific procedure for redeployment based on equity reasons...

(b) Redeployment for equity

The principle of redeployment is introduced to ensure equity and redress throughout the education system. In education, glaring inequities exist in terms of teacher distribution, with an abundance of teachers and small classes in formerly white schools and teacher shortages in townships, informal settlements and rural schools (Nxesi, 1997:33). Due to financial constraints the state cannot hire teachers in areas of shortage. Thus, redeployment becomes central to equity. The basis for redeployment for equity is representivity of:

- race; and
- gender.

However, the redeployee's preference with regard to educational institutions may not be ruled out. In the final analysis educators must have a choice, failing which the employer shall find a suitable placement. Those who refuse to move are not entitled to severance pay and are deemed to have resigned.

In conclusion, one can say that redeployment of educators is a process which is influenced by the following dimensions:

- The technological environment.
- The economic environment.
- The political environment.
- The socio-cultural environment (Schein, 1993:23).

Therefore, planning for this process should revolve around trends mentioned above. In some cases it will be difficult to retain certain personnel. Such cases invokes rationalisation.

#### **5.3.3.7 Rationalisation**

Rationalisation is referred to as redundancy which occurs as a result of reasons and dimensions mentioned earlier in section 5.3.3.6. It is a situation whereby the employer reduces personnel (Lewis, 1993:17). Over and above the reasons already mentioned rationalisation is influenced by:

- Cost-effectiveness.
- Organisational change.
- Availability of sufficient finances.

Rationalisation should take place within a specific legal context. For instance, in cases where a post establishment is to be declared redundant ELRC Resolution 6 of 1998 provides that:

- (i) All educators affected should be treated fairly; and all avenues must be explored to ensure continued employment of educators who occupy posts which are classified in excess in terms of these procedures.

- (ii) Transfer of educators in posts declared in excess in the process of rationalisation is compulsory – but educators who hold posts in excess are not automatically redundant.

(i) Guidelines for rationalisation

When rationalising staff the employer is guided by affirmative action measures and representivity. All educators should be treated in the same way, except for the following temporarily employed educators:

An educator who –

1. does not meet minimum requirements for an appointment, and
2. who has been employed on a continuous basis by a provincial department of education or the Department of Education for longer than 10 years, and
3. who is teaching in a previously disadvantaged institution (institution under control of ex-Department of Education and Training, Self-governing territory or TBVC state), shall be treated in the same way as a permanently employed educator for the purpose of rationalisation.
4. An educator declared in excess in terms of previous processes and who currently finds himself/herself on redeployment list of a provincial education department, shall revert to being a full member of his or her current staff establishment.

- (ii) The Provincial Task Team (PTT) is a body established to facilitate rationalisation and redeployment. It co-ordinates executions from:

- a PED who has to notify all education institutions of its educator post provisioning which may increase or decrease the number of posts of a particular institution.
- the Circuit/District manager who together with principals within the circuit/district must determine posts in excess of the approved establishment as well as vacant posts.
- all principals who must then inform their respective staff on the procedure for rationalisation and on the effect it will have on the staff establishment in the institution.

- representatives of trade union parties to the ELRC who must be invited to observe the process.

Once the District/Circuit Manager has obtained all relevant information from schools that fall in the Circuit/District, the Circuit/District manager must declare an audit of schools that fall within the Circuit/District with certain specified information. In terms of the audit, the Circuit/District manager recommends to the Head of PED which posts should be retained and which to be offered for abolition at an educational institution within the circuit/district. The Circuit/District manager must set out the relevant factors and give reasons to support the recommendation. If the implementation of educator post provisioning will result in an increase of the educator post establishment of an educational institution, the principal shall recommend how the post(s) shall be utilised, taking into account specific curricular needs and circumstances of the institution.

#### **5.3.3.8 Voluntary severance packages**

Voluntary severance packages (VSPs) are meant to release teachers from the system who are not willing to be redeployed. In terms of the collective agreement reached in the ELRC VSPs were to be given as a privilege, a special case scenario, other than an automatic right for all who applied for them. However, in terms of studies made by Hofmeyr (in Garson, 1998:29) VSPs caused a brain drain. They were designed in such a way that they were irresistible to anyone who has been a teacher for more than 20 years. Instead of contributing to the retention of teachers, it encourages voluntary retrenchment with adverse repercussions on the system.

Therefore, what is needed is a system which links retention policies to equity and excellence together by averting post-redundancy problems such as:

- Skill and experience deficiencies.
- Staff shortages.
- Inflexibility.
- Adversarial relations with trade unions.



- Increased workload.
- Low morale among staff (Lewis, 1993:47).

In addition, measures should be taken to minimise voluntary redundancies in form of consultation arrangements, competency-based selection criteria, offering time-off to look for a new job, assistance with job search and counselling. Therefore a redundancy policy is a prerequisite of such an approach. This policy should blend a person's volition to move out of the system with the need for education services by enmeshing the person's skill, abilities, aptitude and adaptability through restructuring. In the same vein, Casterter (1992:480) and Nollen, Eddy & Martin (1978:83) suggest the following cascades which should be included in the retention policy:

- Part-time employment
- Job-hunting assistance
- Retraining of teachers

The policy must identify the potential pool of educators who are eligible for VSPs and the pool must be rank ordered to minimise exit by considering seniority, tenure status, performance ratings, extra duty assignments, and additional certification. The ranked list should be regularly reviewed for the purpose of making deletions and additions. Where it remains impossible to retain educators outplacements can be explored (Granholm, 1991:221). The benefits of voluntary retrenchments must be based on legal provisions. Following these guidelines will help promote the morale of the remaining workforce because it demonstrates that the employer is committed to doing all that is reasonably possible in helping individuals who, through no fault of their own, have their employment rationalised. Furthermore, it will reduce the possibility of disruptive labour actions and litigation by former employees. In that way supportive family relationships will be established.

## 5.4 CONCLUSION

An attempt was made in this chapter to provide for guidelines, emanating from findings from the literature study and the empirical investigation. The guidelines were discussed separately according to variables such as recognition of competence, empowerment and capacity building, and retention of teachers. The separation was done to enhance implementation but not that they are diametrically opposed to each other. With regard to recognition of competence it is established that effective recognition begins when teachers enrol for teacher education (in-service) till the end of service. Therefore, recognition of competence is a process and not a once-off issue.

Likewise, empowerment and capacity building should be seen as continuous elements of recognition of competence which seek to address material factors, skill and attitude complementarily so that educators who will remain serving in the system should be the ones who are excellent. Both concepts aim at creating an enabling environment whereby the individual excel and grow. The removal of barriers in the system will necessitate retention and enhance it. However, it must be noted that despite efforts to retain teachers, there are certain constraints that militates against retention. Nevertheless retrenchments should be within the guidelines of the law and collective agreements. And it must be noted that the situation is not as bleak as it is painted by the media.

## CHAPTER SIX

### 6. OVERVIEW, CONCLUSION AND RECOMMENDATIONS

#### 6.1 OVERVIEW

As we move into the twenty-first century, there is a need to face socio-economic challenges that impact on the education system with confidence. The biggest challenge is to reconstruct the education system to ensure South Africa's international competitiveness and internal growth. It is from internal growth that South Africa can relate and compete with her contemporaries and counterparts. This ideal requires production and retention of skilled and educated human resources who can advance scientifically and technologically. For this reason, recognition of competence is deployed to ensure that teachers, who remain critical to the country's human resources development, are able to:

- Demonstrate the ability to consider a range of possibilities for action, make considered decisions about which possibility to follow, and to perform the chosen action (practical competence);
- Adapt action to different contexts by having knowledge and thinking which underpins and informs the action taken (foundational competence); and
- Remain excellent in their teaching. This refers to the ability to connect decision-making and performance (practical experience) with understanding (foundational competence) and use this to adapt to change or unforeseen circumstances, to innovate within one's own practice, and to explain the reasons behind these innovations and adaptations (reflexive competence)(Sergiovanni & Starrat, 1993:269)..

Similarly, this project has sought to track the link between economic factors and education solutions to development. The integrative forces of the economy will require a common work ethos. It is futile to expect teachers to operate as a team, while coming from racially and culturally segregated educational institutions with glaring disparities in resources. Hence it is necessary to empower and capacitate teachers and institutions to advance towards global competitiveness and internal growth. The problem to unravel is

that better schools tend to gravitate to higher income areas thereby limiting educational choice and disadvantaging the more gifted children of the poor. Thus recognition of competence aims to redress this (Syncom, 1986:4). One of the key targets for recognition of competence, in the interest of the child as much as of the country, is to inject excellence in teachers irrespective of race, location and culture.

In the same vein, recognition of competence seeks to familiarise teachers and managers with change – to anticipate and match the accelerated rate of change. This model seeks to integrate social and economic structures with the education system so that teachers' anger and frustration resulting from the disparities, irrelevance and insufficient recognition opportunities are alleviated. The researcher begins to show this right from CHAPTER ONE in which the following were dealt with:

- Orientation
- Problem statement
- Aims and objectives of the research
- Research methods
- Clarification of concepts

This notion permeated CHAPTER TWO whereby the researcher identified components of competence, the objectives for the recognition of competence, and unravelled the National Qualifications Framework. This chapter develops new perspectives in human resources development by investigating the relationship between recognition of competence and human resources management, analysing practices in rewarding and valuing and pertinent issues in the recognition of competence as well as synchronising the aspects of recognition of competence with organisational management.

Likewise, in CHAPTER THREE the researcher discussed the notion of empowerment and capacity building according to objectives and assumptions, logical considerations of empowerment, empowerment programmes and models. Furthermore, a critical account of capacity building is highlighted in the form of discussing the legacy of apartheid, objectives and programmes.



The need to arrive at factual and informed arguments urged the researcher to embark upon an empirical investigation – CHAPTER FOUR. In this chapter the researcher dealt with methodological considerations – that is, addressing questions asking reasons for the use of a particular method of study. The sampling method is also described.

In CHAPTER FIVE the researcher discusses and analyses research findings – both from the literature study and the survey. Research studies reveal a myriad of problems. The researcher suggested different ways of improving practices in human resources management and development through guidelines. Methods and strategies are suggested. Tentative solutions are outlined in this chapter.

## 6.2 PROBLEM SOLVING

In section 1.3 of Chapter One the problem stated was: **Do human resources management aspects influence the quality of service in public education?** And the investigation was done to answer the question of what ways and means are available to develop and train teachers in order to retain them? Evidence from literature studies point out that quality service in public education is adversely affected by inadequate human resources management and development aspects such as competence, motivation and education and training as well as resources. It was found that the context in which teaching is taking place is fraught with deficiencies ranging from an inadequate reward system to deprivation.

The empirical research findings also concur to the inefficiencies and shortages as contributors to poor service in public education. The researcher discovered that there are certain aspects of recognition of competence, empowerment and capacity building, and retention that needs urgent attention. For instance most teachers complain of poor development services from the employer. Remedial strategies and guidelines are suggested in order to solve and address the problems raised. However, it must be noted that any strategy or guideline suggested may not be used alone. A combination of strategies, approaches and guidelines may be useful. Furthermore, there is a need to consider institutional constraints and the individual teacher's circumstances. In that way recognition of competence promises to provide a holistic approach to development of

teachers so as to improve the quality of service in public education. The hallmark of this model is the suggestion of new options in human resources management and development. Although recognition of competence cannot be a panacea alone to education problems, it may improve conditions in teaching and management if implemented according to the guidelines and recommendations suggested.

Recognition of competence will give an impetus to transformation by engendering a commitment among teachers to all educational goals in terms of explicit behavioural attributes of what a person is able to do once an educational activity has been mastered. According to Monjan & Gassner (1979:4) these behavioural attributes are called performance objectives. In other words, quality service in public education requires specific actions that teachers are able to perform satisfactorily. Since the goals are defined behaviourally in terms of what a person who has attained them is capable of doing, there is little room for ambiguity. This clarity of objectives has two major advantages ; the teacher can make informed decisions and choices about what he or she wants to do, and such clarity can provide institutions with a clear criteria by which they can measure the effectiveness of their educational activities.

### **6.3 ATTAINMENT OF AIMS AND OBJECTIVES**

The aims and objectives of this research project have been indicated in section 1.4 of Chapter One. With regard to the aims, the researcher seems to be successful in that this project unravelled aspects of human resource management. These aspects were identified, analysed and synchronised with guidelines and recommendations. It is revealed that recognition of competence may help teachers realise their full potential while at the same time ensuring their job security. Measures, programmes and strategies for the retention of teachers were explicitly identified. In addition, the researcher brought to light the crucial aspects of empowerment and capacity building which seem to be the basic tenets of quality service in the public education.

The findings from the literature study, which reveal glaring inadequacies in the recognition system, corroborates evidence from empirical research, which reveals the dire need for teacher development and motivation through recognition of competence.

The success of this research project is strengthened by suggestion of means and ways of coming out of the education morass. Guidelines and recommendations are given to alleviate the situation. On the basis of the information given the researcher deems it fit to declare that aims and objectives of the project were attained, for current practices were unravelled, transformation challenges were identified, the strengths and weaknesses of the current system were brought to light, and the nitty-gritty's of human resources management and development were discussed as well.

#### **6.4 CONCLUSIONS**

The conclusions that can be drawn for this project include among others that there appears to be a problem of poor morale in teaching and that money alone is not the only problem alone. Inappropriate policy choices are jeopardising the learner's right to education and disgruntle teachers thereby increasing instability in education. Poor management and lack of capacity is exacerbating the problem.

The education system does not match the requirements of the society which is evidenced by high unemployment rate, and lower economic growth. It means the skills acquired in schools do not resonate with societal economic needs and render graduates less functional and unattractive to the labour market. Recognition of competence is a model that attempts to refocus teaching to address these problems. This shift in knowledge acquisition does not attempt to mechanise and destroy originality and initiative but encourages individuality to enhance skills, attitudes and knowledge. Thus, individuality will be harnessed to increase productivity (high quality service) in the public education.

It stands to reason that the summary treatment of education human resources management and development only illustrates the general principles involved in the recognition of competence and contains many grey areas. For instance, at present, teachers' salaries and rewards are not performance related but generic. This leads to poor teachers being overpaid and excellent teachers being underpaid. This encourages mediocrity and plunges the education system's excellent teachers deeper into frustration and confusion. The employer's remuneration system and benefits must be used to keep

everyone on their toes by regular performance appraisal. The central objective of the use of recognition of competence is to maximise service delivery with a minimum of administrative costs. It is no use for the employer to continue lamenting of the situation that teachers' output does not meet the normal or average level. One way to overcome this is for employers to get their act together and focus on specifics of output requirements.

A deeper analysis of the current situation reveals that the crisis in education is global, so is the search for solutions. In the South African situation the main grievances are:

- lack of relevance;
- lack of educational resources;
- declining performance in spite of increased spending; and
- glaring inequalities between the races in infrastructure, teacher qualifications and examination results.

Therefore, reform and transformation proposals should be made with the understanding that specific problems are part of general deficiencies in the total system. Again it should be emphasised that more spending alone will achieve little. In fact, increased funding without addressing the root causes of the crisis will only aggravate the problem. In the same vein, it is noted that education problems emanate from social problems experienced in the larger society. For instance, if a teacher earns a meagre salary and cannot afford the day-to-day necessities such as food, clothes, housing and health, it will be unreasonable of the employer to expect teachers to be productive.

Furthermore, changes in our economic structure and technological advances will make the acquisition of new skills a lifelong obligation. Thus, teachers are obliged to constantly review, develop and empower themselves in order to remain relevant and useful to the system. Equally, the employer should commit itself to helping teachers in their continued education and training. The process of lifelong learning must become a joint responsibility of both the employer and the employee. The same applies to solutions suggested to improve the situation in education. It is useless to continue

making more policies as if policies in themselves will translate into tangible actions. The art of making legislation and policies should be followed by mechanisms to give effect to that legislation or policy. Teachers should understand and have the capacity to give effect to changes at school level. Otherwise the ideal of quality service delivery will remain a tantalising mirage.

## 6.5 RECOMMENDATIONS

Taking into account the conclusions given above, the researcher will suggest remedial programmes to problems identified with the consideration that the efficiency of the education system depends largely on involvement of all stakeholders including experimentation and innovation at school and community level. The recommendations are divided into short-term and long-term recommendations. The division was guided by principles such as:

- **Consensus and commitment:** They must be based on a shared vision and a common understanding of what constitutes quality service.
- **Contextual relevance:** They must take into account historical and local factors that impact on education.
- **Co-operation and co-ordination:** All stakeholders must co-operate with each other to co-ordinate national policies at school level.
- **Coherence:** Local initiatives and innovations must resonate with national legislation and policies.
- **Creativity:** Schools must explore a mine wealth of opportunities derived from human, material and policy support for growth and development.
- **Effectiveness:** Educational authorities must strive to do the right things correctly to enhance the school's accountability.
- **Efficiency:** Educational authorities must do things correctly to improve accountability.
- **Relevance:** Sustaining the ability to learn and adapt.
- **Performance:** Recognition programmes and measures should ensure that teachers who are retained perform above level.

- Equality: Equal opportunities for education, including equal standards in education, for everyone irrespective of race, gender, creed, sex or religion, shall be the purposeful endeavour of education.
- Integration: Recognition must be given to skills, attitudes and knowledge (competence) acquired in education and training through formal, non-formal and informal systems.
- Affordability: No educational programme can succeed unless it is affordable (Maepa, 1999:96-97; SYNCOM, 1986:5-10).

Short-term recommendations are recommendations that seem to be corrective to the current situation and can probably be implemented immediately for immediate results, on the one hand. On the other hand, long-term recommendations are suggestions that are not immediately possible to attain but can be attained in the long run and could have sustainable positive results. Furthermore, the dichotomy is done according to the three variables:

- Recognition of competence.
- Empowerment and capacity building.
- Retention of teachers.

It is hoped that this type of approach will help to enhance and improve implementation with minimum hurdles.

### **6.5.1 Short-term recommendations**

#### **6.5.1.1 *With regard to recognition of competence***

##### **(i) Credit accumulation**

Teachers should be rewarded and given recognition on the basis of credits they have accumulated. These credits are based on outcomes that have been achieved and a portfolio is built until a certain determined level. This strategy is based on the process of

continuous assessment whereby teachers are regularly assessed. That means a teacher's performance will be monitored continuously by employing approaches such as peer and self-assessment initiating projects and assisting teachers in putting together portfolios. Evidence collection for use in assessment will be on going, linked with normal course of working, not from once-off assessment periodic incursions.

(ii) Integrated education and training

The separate education and training tracks do not augur well for quality service. It reflects a rigid and outmoded distinction between academic education and vocational training. Hence the education system is not linked with industries and resulted into a distorted labour market. By integrating education and training quality service will be a reality because the teacher's skill, knowledge and value orientation as demonstrated to a defined standard in a specific context will be integrated as well. Quality service will be based on an integrated cluster of skills executed within an indicated range of context. Teachers' abilities and understanding will be transferred to other related contexts. And teaching will be marked by innovation and creativity. Furthermore, our chances of coping with globalisation pressures will be increased through flexible specialisation. This initiative will expose learners to a range of learning options which cut across the traditional divisions between academic and vocational learning.

(iii) New qualifications structure

The new qualifications structure proposed is based on a more flexible combination of fundamental, core and elective learning credits, with the aim of linking education and training, theory and practice more closely together. The new qualifications structure is co-ordinated by a single accreditation framework creating linkages across previously divided tracks. It will create incentives for learning, and is cumulative. Learner progression will be based on the accumulation of modules along multiple learning pathways (Kraak in Jansen & Christie, 1999:27).

(iv) Enhanced articulation

The education system should offer second chance opportunities for retraining, personal development, community and leisure courses. Learners should be able to move within bands as a means of changing career direction or acquiring career-orientation training and to meet a range of community and personal needs. In that way, the ideal of life-long learning will be realistic. This requires removal of boundaries between Further Education and Training (FET) and Higher Education (HE). Bands should be permeable and made increasingly inter-dependent (Department of Education, 1998:24).

(v) Flexibility and responsiveness to diversity of skills

The education system plays a critical role in skills formation and in improving the skill base of the country. This task should be carried out in accordance with the varying needs and demands of clients. The programme content and modes of delivery need to be far more closely linked to the requirements of the people who are currently employed and who seek retraining. Education programmes should be more responsive to employment requirements in and outside the education sector. This requires:

- a shift from rigid bureaucratic planning and management to an approach which more effectively balances efficient state co-ordination with market responsiveness;
- state steering, rather than state control, which encourages and rewards innovation and quality;
- the structuring of effective linkages and partnerships;
- local and regional responsiveness to labour market conditions, within the framework of national policy, goals and objectives;
- the provision of a more diverse and high quality range of learning programmes to meet the needs of a wider range of clients; and
- programme-based funding, which is demand sensitive, and which supports the development of new priority programmes in accordance with the medium to long-term needs of the economy and society (Department of Education, 1998:23).

(vi) Show-casing excellence

This involves using teachers from schools which produce better results to showcase excellent strategies, methods and approaches to teaching. In this way, the self-esteem of teachers will be enhanced from recognition by peers. Showcasing should be complemented by certificates, titles, status symbols and promotions. This will help increase teachers' level of motivation. Showcasing should include prospects of growth, achievement and advancement. It will finally make teaching a challenging job where achievement in the workplace is recognised and encouraged by providing self-actualisation opportunities.

(vii) Quality assurance system

The primary function of this system would be to promote the quality of academic programmes, and monitor standards and academic outputs. Its secondary functions include evaluation, monitoring of external programmes with impact on education and evaluation of departments within a school, as well as facilitation of quality review. However, it must be noted that management of quality is multi-faceted, involving the setting and management of standards with respect to qualifications, learning, teaching and training, assessment, management and leadership, and educational resourcing. The hallmark of management of quality is continuous improvement.

(viii) Cascading recognition

Cascading recognition refers to the consideration of workload, class size and experience. Recognition should be given to performance of work outside normal working hours in emergency circumstances. The allocation of scheduled teaching time should be done in a manner to maximise the individual abilities of all educators, and to optimise teaching and learning at the institutional level.

### **6.5.1.2 With regard to empowerment and capacity building**

#### **(i) The National Teachers Education Audit**

There is a need to take stock of teacher's education. This approach will profile skill, abilities and knowledge (competence) of teachers. It will help in analysing teacher demand, supply, utilisation and costs. The reasons for the audit may be varied but the above are important and are linked to evaluation of teacher education to determine whether education programmes accredited are on track with the ultimate aim of education.

#### **(ii) Managing personality resources**

The biggest challenge facing human resources managers is to keep the level of motivation of their staff at satisfactory level whereby staff will continue to perform despite all odds. In the light of this reason, there is a need to manage personality resources such as knowledge, beliefs, attitude, creativity, values, traits, attributes, experience and self-esteem. Although motivational theories may be helpful, the following strategies may be helpful:

- Empowering leadership styles which include among others, democratic leadership, invitational leadership, delegative leadership, instructional leadership, and strategic leadership.
- Management skills – planning, directing, organising and control.
- Management strategies – assertiveness, change management.
- Network, partnerships and communication.
- Staff counselling.
- Accessing resources.
- Consultancy.
- Creating an open climate and a democratic culture.

(iii) Transdisciplinary knowledge

Teacher education should be characterised by flexible specialisation not pigeonholing individuals to a particular discipline. Knowledge should be developed programmatically in the spirit of integrated education and training. A transdisciplinary construct of knowledge should cut across traditional disciplinary boundaries and must link academic knowledge to the requirements and problems of the society and economy at large. In the same vein, this approach will promote transinstitutional partnerships and network, and enhance communication among providers.

(iv) Competency-based selection batteries

The success of recognition of competence depends to a larger extent on its applicability right from the onset when a candidate is selected for a course in teacher education. Thus, selection should be done on the basis of competence. Therefore, the selection battery should include among others:

- General mental ability and differential aptitudes.
- Interests categorised into personality types.
- Attitude towards study and education.
- Biographical information.

(v) Open learning

Open learning means that the learner has a choice. He or she has the freedom to manoeuvre. The learner has more control. There is not as much control imposed by lecturers or instructors as in conventional education and training. 'Open' can also sometimes refer to entry criteria and can be done at home, (Race, 1989:15) library, workplace, or just about anywhere. Open learners may choose where, when and how to learn or study. It is often equated with distance education, and is relevant for the ideal of lifelong learning.

(vi) Student enrolment scheme

Given the apathy to furthering studies among teachers it is necessary to solicit interest to studies through the use of a student enrolment scheme. It is a scheme whereby learners are given priority according to interest, and given incentives to study. It will work effectively if used together with the student financial aid scheme. The employer may negotiate with Higher Education institutions (as it is the case with the Rand Afrikaanse Universiteit (RAU) and the Gauteng Department of Education) to help offer short courses or admit their learners to their programmes, especially in science, engineering and technology.

(vii) Student financial aid scheme

This will be favourable for the advancement of the disadvantaged and deprived groups. It should be carried out along the lines of Skills Development Act Learnerships and Student Financial Aid Scheme Bill's guidelines. However, this scheme must not be misconstrued to be handout, but learners must be assessed – their potential and socio-economic circumstances, and the ability to repay must be the criteria.

(viii) Development and support programmes

Teachers should not be left alone to navigate their way out of problems they encounter in their profession abstracted from the social conditions of poverty, continued racial oppression, pedagogical neglect, and cultural rebuttals. There should be programmes to develop and support them, but I am not suggesting that they should be baby-sitted. What I am suggesting is a continuous strategy of development and regular support programmes intended to refine teachers' skills. Amongst others the following may be helpful:

- In-service courses.
- Workshops.
- Seminars.

- Lectures.

And many other models and programmes outlined in the previous chapters, including induction, mentorship, coaching and tutoring.

(ix) PRESET-INSET sandwich

There is a need for a national policy framework which will link pre-service education and training (PRESET) and in-service education and training (INSET). This may be done in the form of block-release where trainees attend theoretical programmes (PRESET) and practical programmes (INSET) at a specific period during the academic year.

(x) Teacher development officer

Because teacher development is deemed to be a continuous programme, it is necessary that a development officer be appointed, be it at national or provincial level, to facilitate the programmes. He or she will also be concerned with regular enquiry into skills of teachers (skills audit), evaluate policy changes that impact on education and organise development programmes for the purpose. His or her job description may also cover aspects of assessment and compile competence portfolios of teachers with the help of institutions.

(xi) School register of needs

The Department of Education's initiative to compile the school register of needs should be lauded, but it should be done regularly, say every three years to identify shortages and surpluses. However, at regional level it should be done annually.

### **6.5.1.3 With regard to retention of teachers**

#### **(i) Medium Term Expenditure Framework**

Realising that the greatest challenge facing the education system is the quantitative delivery of educational opportunities, especially for the poorest families, and qualitative advance in education effectiveness, there is a need to improve the process of budgeting in provincial education. Even though the crisis in education is not solely financial, the management of resources and delivery of services are hampered by a serious lack of capacity. The most serious problem lies in the domain of personnel provisioning and funding (Prinsloo, 1999:192). Most provincial education departments lack capacity to ensure adequate control over recruitment and personnel management decisions, and lack effective tools to manage the costs of their personnel establishments, and in particular to manage the number of employees in relation to their budgets (Hassen & Naidoo, 1999:8; Donaldson, 1997:32). The result is total high expenditure.

This situation requires that there should be:

- planning of programmes and staffing which proceed on the basis of approved future spending;
- address of policy issues within the context of an agreed expenditure framework;
- the link between capital spending and future operating costs of new or expanded schools and colleges; and
- analysis and comparison of inter-provincial spending projections with historical trends.

#### **(ii) Transfer schemes**

This is directly linked to credit accumulation referred to earlier in section 6.5.1.2(l). It means that when the teacher has accumulated credits he or she is able to move (mobility – recognition) across the ranks within the education and training. However, it means that a contingent of factors is considered for the teacher to advance vertically or

horizontally, not just a once-off attainment of qualifications. A variety of factors must be considered in offering tenure status to teachers.

(iii) Monitoring staffing levels

Rightsizing in the public service is a continuous process and this requires continuous assessment of staffing to ensure the availability of skilled personnel. This must be closely monitored to overcome school managers' weakness of inflating and deflating data to their advantage.

(iv) Democratic workplace

Retention of staff requires transparent and participatory workplaces whereby parents, teachers, education authorities, business, experts and learners play a role in determining the curriculum – which impacts heavily on staffing. Democratic workplaces require managers to involve teachers in determining performance indicators – and the role of unions should not be ignored. This does not mean that the manager will lose power and authority (Davies, 1994:74), but by harnessing diverse skills and abilities most taxing problems can be resolved.

(v) Strategic planning team

By involving all stakeholders schools may be enriched by identifying different sources. Quality service delivery requires identification of the school's strength and weaknesses, and opportunities to overcome threats. This requires a business approach to management of schools and a strategic planning team may be the ideal beginning of this approach. It will help in making forecasts with regard to student enrolment and teacher attrition.

(vi) Increasing the authority of the school governing bodies.

School governing bodies must be given more powers in staff provisioning rather than only to recommend. As local employers they have first hand information about local problems.

(vii) Marketing programme

Because it is explicitly stated in the South African Schools Act that the State cannot do everything for the school, schools must embark on an aggressive marketing drive not only for resources but also for more enrolments. Marketing should be linked to the quality of programmes offered in academics.

(viii) Inter-institutional education and training

Institutions of higher learning admissions for teacher trainees must be co-ordinated to curb over-production of teachers. The regulation must be extended to areas of specialisation such that more trainees can be admitted to studies in science, engineering and technology – areas where there is an acute shortage of teachers.

(ix) Education and training vouchers

The government must redirect redundant skills to areas of need by offering education and training vouchers which include enrolment offer and financial assistance. Giving voluntary severance packages may not augur for the development of this countries. People must be equipped with entrepreneurial skills to use those packages for further employment. A social plan is needed in education.

(x) Outsourcing

Skills of retired personnel can be used in areas where there is an acute shortage. Scientists in private companies can be outsourced for urgent delivery of education service. Although this may be costly, innovative ways of seeking help from outside must be encouraged. Consultants may also be used. In this era of high unemployment, school managers may find 'freelance' teachers handy to overcome local shortages.

**6.6.2 Long-term recommendations**

**6.5.2.1 *With regard to recognition of competence***

(i) Recognition of prior learning

It must be established that the notion of half competence does not exist. A person is either competent or not. The research does not suggest fractional recognition by recognition of prior learning. What is suggested is a flexible recognition programme that recognises prior learning to multiply and magnify underqualified teachers' – with an experience span of at least ten consecutive years – confidence and morale. Credits should be given for experience and should open opportunities towards certification.

(ii) Wage policy

A wage policy must be developed to provide direction and certainty to salary increases, introduce parity in non-wage benefits and provide a policy that links wages to delivery. The wage policy must be proactive in addressing crisis and instability in education. It must address issues such as:

- Mandatory issues – which include wage hours of employment, salary schedules, condition of employment, fringe benefits, overtime payment, vacations, holidays, sick leave, and sabbatical leave.
- Permissive issues – include matters of mutual interest such as safety rules, training, technological change and modernisation.

- Prohibited issues – these are issues strictly forbidden by the law such as discrimination by race, sex, ethnic or social origin.

(iii) Implementing collective agreements

A collective agreement is the product of collective bargaining. It is binding to the employer and the employee organisations. Failure to implement this will reduce the bargaining process to a talkshop, and polarise employee parties who will disturb order and stability in education. Furthermore, teachers will be frustrated and angered at the same time.

(iv) New macro-economic policy options

Although one has earlier acknowledged that problems in education are not money related alone, one cannot condone the effects of Growth, Employment and Redistribution (GEAR) policies – with its fiscal restraint and reduced social spending. GEAR is contractionist and cannot address the huge educational defeats inherited from apartheid. The notion of quality service delivery in education cannot be realised without addressing social problems that impact on education such as eradication of poverty, creation of jobs, housing, and infrastructure development.

What is needed is a mixed economic policy which embodies the elements of a welfare state and those of business. Such a policy must have the following elements:

- Recovering the public cost of higher education and reallocating government spending on education toward the level with the highest social returns.
- Developing a credit market for education together with selective scholarships, especially in higher education.
- Decentralising the management of public education and encouraging the expansion of private and community-supported schools (The World Bank, 1986:2; The World Bank, 1988:2).

The new policy options suggested will improve efficiency and equity. There should be a thorough analysis of appropriate individual country's conditions before borrowing from other countries. The framework for the new policy must include principles such as:

- Adjustment to current demographic and fiscal realities.
- Revitalisation of the existing educational infrastructure.
- Selective expansion of educational services (The World Bank, 1988:2-3).

Although one must concede that there is no exact panacea for structural adjustment problems and education skills, it would not help to:

- revise pay scales by lowering unit costs;
- hiring less qualified teachers;
- increasing teacher workloads;
- increasing class average size; and even
- replacing teachers by other factors of production (The World Bank, 1984:68-74).

(v) Teachers' Day

A special day should be chosen to tell teachers that we are thankful to them for their hard work and dedication and most importantly for heavy responsibilities they bear in educating the children of today to become the citizens of tomorrow. To raise our voices in solidarity with teachers who, despite all odds, rise above all challenges. This will enhance professional commitment of all educators. For example, motivational seminars, rallies and workshops should be convened during the World Teacher's Day. And it should be an annual event, speakers of note and repute should be invited.

(vi) Broadbanding

Broad-banding means the grouping together of a number of grades into bands by reducing the total number of levels utilised in the wage salary structure. It will compress the salary scales to improve the status of poorly paid workers at the bottom end of the scale:

(vii) Performance-related incentives

Although in education agreement has not been reached as to the criteria to be used to measure performance, performance-related incentives may be motivational to teachers in that teachers will receive cash bonuses, time off, and promotion for quality performance. These incentives should not affect the teacher's basic salary and inflation – related increase. However, it seems it will be feasible and applicable only if an agreement is reached in the bargaining chamber.

(viii) Job enrichment strategies

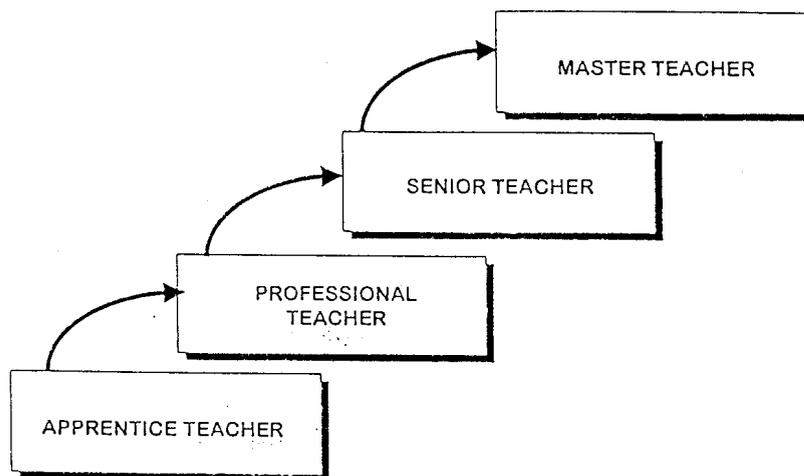
People want to work to involve challenge, meaning and self-expression as well as material rewards. This is particularly true according to findings arrived at the empirical investigation. Job satisfaction, good relations, working in a well-managed school are rated as priorities among others. Teachers' morale can be enhanced by:

- assigning individuals specific or specialised tasks enabling them to become experts;
- increasing the accountability of individuals for own work;
- removing some controls while retaining accountability;
- granting additional authority to a teacher in his or her activity (job freedom);
- giving a person a complete achievable unit of work for self actualisation; and
- making periodic reports directly available to the teacher him/herself rather than to the principal (Al-Khalifa, Hall & McMahon, 1993:123).

(ix) Dual career ladders

This model allows teachers to grow within teaching as opposed to the hierarchical model whereby excellent teachers are taken out of the classroom to management with less teaching work. It will motivate excellent teachers. More opportunities will be created for them to advance. And advancement should go according to stages. It is linked to performance appraisal. The stages that have to be rewarded are shown in figure 6.1 below.

Figure 6.1: Career ladders for teachers



Source: Maile, 1998:198.

6.5.2.2 *With regard to empowerment and capacity building*

(i) Human Resource Development Institute

The institute would operate as a model in a national network of institutions with strong linkages to the provincial education management development initiatives, and would provide a locus for intellectual leadership and new ideas, and policies for research and development. The institute would draw expertise from non-governmental organisations, schools, research institutes, and tertiary institutions.

(ii) Research and development centre

This is a centre where clusters of teachers will converge to acquire new skills or improve on the existing ones. It is a library of resources that allow people to develop in areas that may not be covered by training courses. The centre will deal directly with staff problems and will suggest solutions by placing individual teachers on a course. Schools should identify their own needs and send them to the centre, which in turn plan courses, workshops according to those needs (Scott, 1997:5).

(iii) Universities/Technikon outreach programmes

Currently partnerships between tertiary institutions are limited if not rare. I suggest that the tertiary institutions embark on a campaign to adopt schools whereby their faculties and departments share expertise with teachers. The 'adopt-a-school' campaign should be intensified.

(iv) Educators' council

The role of South African Council for Education should not only be that of registration, control, determination of standards and disciplinary procedures, but must also include development.

(v) Community learning centres

These are decentralised centres in classrooms of schools where all stakeholders meet to address teaching and learning problems. Alternatively, teachers of particular ward or circuit may cluster to share scarce resources. This is where the excellent teachers may showcase their talents.

(vi) Equity programmes

Education human resources management and development has to work within national and provincial equal opportunities legislation relating to employment, for example

- Basic Conditions of Employment Act, 1998
- Employment of Educators Act, 1998
- Employment Equity Act, 1998
- Skills Development Act, 1998
- Labour Relations Act, 1995
- Constitutions of the Republic of South Africa Act, 1996
- South African Qualifications Authority Act, 1995
- South African Schools Act, 1996

Schools must comply to this body of law. In urging schools to comply, the following suggestions may be useful:

- Acknowledging political interventions in the form of implementing decisions of the Commission for Equity and Gender Equity Unit.
- Making education buildings more accessible and friendly to handicapped people by creating ramps and connecting lifts or elevators to offices or classrooms.
- Training teachers in special education.
- Immersing learners to anti-discrimination development strategies early in their lives.
- Making human rights part of the curriculum.
- Equity recruitment and selection procedures.

(vii) Counselling and Advisory Services

Many teachers have social problems which are not employment related but affect them tremendously such that they cannot perform to their utmost peak. Instead of telling them not to bring their problems to work school managers must refer them to Counselling and Advisory Services (CAS). CAS must be staffed with skilled psychologists, psychiatrists, counsellors who will offer clinical counselling services to staff on voluntary and invitational basis. Financial staff and social workers may be linked to this unit to help teachers regain self-confidence and morale. Work is part of life, employees do not conveniently forget hardships just because they are at work. They cannot function well if

they are facing problems at work. In fact researchers in human resource management reveal that organisations which recognise that employees function better if they are coping with challenges in their broader lives are productive. A productive workforce is epitomised by control of life.

This welfare service is in the interest of the education system. Taking into the burdens the system faces, CAS can be made accessible to schools through a toll free number which employees can call (anonymously, if they wish) 24 hours a day, seven days a week. Call centre psychologists will intervene immediately in a trauma situation, but will refer callers to face-to-face intervention when required.

#### **6.5.2.3      *With regard to retention of teachers***

##### **(i)      Reassigning of teachers and reskilling**

Instead of laying-off teachers, avenues of retention such as reassignment and reskilling may be explored. This entails sending teachers to short courses, or part time courses to retrain redundant teachers in areas where there is a need. The advantage with teachers is that they are retrainable.

##### **(ii)      Performance agreement**

Teachers who remain in teaching should sign a performance accord as part of their contract of employment. It must be noted that this may raise rebuttals from unions. Therefore, it is proper to solicit support of unions first. A properly constructed accord should ensure that:

- Its content and meaning is communicated to and understood by workers and employer officials.
- Affirmative action is implemented in such a way that it promotes productivity and does not destroy workplace efficiency.
- Teachers are integrally involved in ongoing measurement of productivity.

- Teachers are rewarded for productivity is clearly apparent and that they see their share as fair (Israelstam, 1999:6).

The productivity accord should not be seen as a trap to apprehend teachers but rather as a long awaited opportunity to earn a living and to teach without impediments, because:

- content of jobs and work environment will be cleared of inadequacies;
- workplaces will be made safe and conducive;
- teachers themselves are involved in setting objectives and plans for their work programme;
- authority is delegated;
- objectives and standards will be reviewed with adequate feedback to teachers on how they are performing;
- management will be based on teamwork and integration of the contributions of all team members; and
- adequate communication channels will be established to share information, ideas and suggestions with employees and management.

Whatever direction taken teachers should be guaranteed recourse to due process of the law. Underperformers will be introduced to developmental programmes, rather than dismissing them outright.

(iii) Budget process reform

Increased influence of the bargaining process on the budget process is a condition for meaningful, good faith collective bargaining processes. The linkage of the two processes will ensure that the integrity of the bargaining process is protected and that the Government can project spending accurately. The resolution of this area would create conditions for sustainable and improved retention of teachers.

(iv) Education Information and Transparency Unit

Although one cannot declare that there is corruption in education, proactive measures must be taken to redeem the system of maladministration and corruption. Experience should be drawn from Transparency International and Community Information, Empowerment and Transparency. The unit must develop a social audit to help uproot corruption and it should include, the following process:

- Get the evidence: Hard evidence is needed on education services from the standpoint of users (learners). Modern survey techniques must be used to measure the real gap between the intended service delivery and actual service received. When teachers dodge lessons they should be made accountable for student failure.
- Impartiality: The assessment must be impartial, drawing from contextual factors.
- Create a win-win situation: Even a bad audit can be framed as a baseline, a starting point to improve service performance, to document losses and to identify where leakages occur.
- Repeat audit: The very fact that the social audit will be repeated can encourage public servants to be more accountable.
- Show progress: Performance is required across the board. Everyone needs to see their opinions taken into account and whether the actions work.
- No witchhunt: A social audit is intended to focus on system flaws and to build local solutions.
- Disseminate the results: When the same evidence is known and held by the decision makers, the public service workers and members of the public, it becomes more difficult to avoid making the obvious changes (Myburg, 1999:9).

(v) Intergovernmental Financial Review

The function of this body is basically about financial management. It does this by forwarding estimates of the provincial government for the subsequent two years together with the existing budget estimates. This joint venture will help in the retention of teachers in that overspending and unfunded mandates will be minimised. Every project will be run within the constraints of the budget. The projections of spending will, furthermore, increase the prospects of teacher retention because existing trends will be analysed and compared to determine how many teachers can be retained. This unit will use the budget gains to increase revenue which would bail them out when they ran out of money.

(vi) Interprovincial Staffing Task Team

When considering the demographic distribution one finds that some provinces have a large number of school going population. This impact heavily on staffing when the teacher-pupil ratio is considered. This Task Team will ensure an even distribution of teachers to areas where there is a need. This will be done on the basis of statistics supplied by the provincial department on post establishment of institutions. As such this body should facilitate the entire redeployment process. Some provinces may not absorb the entire teachers' 'surplus', personnel should therefore be distributed to other provinces. It will co-ordinate budget increases for personnel provisioning in the future.

**Table 6.1: Summary of the Recommendations.**

<b>SHORT-TERM RECOMMENDATIONS</b>					
<b>Recognition of Competence</b>		<b>Empowerment and capacity building</b>		<b>Retention of teachers</b>	
(i)	Credit accumulation.	(i)	The National Teacher Education Audit.	(i)	Medium Term Expenditure Framework.
(ii)	Integrated education and training.	(ii)	Managing personality resources.	(ii)	Transfer schemes.
(iii)	New qualifications structure.	(iii)	Transdisciplinary knowledge.	(iii)	Monitoring staffing levels.
(iv)	Enhanced articulation.	(iv)	Competency-based selection batteries.	(iv)	Democratic workplace.
(v)	Flexibility and responsiveness to diversity of skills.	(v)	Open learning.	(v)	Strategic planning team.
(vi)	Showcasing excellence.	(vi)	Student Enrolment Scheme.	(vi)	Increasing the authority of the SGB.
(vii)	Quality assurance system.	(vii)	Student Financial Aid Scheme.	(vii)	Marketing programmes.
(viii)	Cascading recognition.	(viii)	Development and Support programmes.	(viii)	Interinstitutional education and training.
		(ix)	PRESET-INSET sandwich.	(ix)	Education and training vouchers.
		(x)	Teacher development officer.	(x)	Outsourcing.
		(xi)	School register of needs.		
<b>LONG-TERM RECOMMENDATIONS</b>					
(i)	Recognition of prior learning.	(i)	Human Resource Development Institute.	(i)	Reassignment of teachers and reskilling.
(ii)	Wage policy.	(ii)	Research and Development Centre.	(ii)	Performance agreement.
(iii)	Implementing collective bargaining agreements.	(iii)	Universities/Technikons	(iii)	Budget process reform
(iv)	New macro-economic policy options.	(iv)	Educators' Council.	(iv)	Education Information Transparency Unit.
(v)	Teachers' Day.	(v)	Community Learning Centres.	(v)	Intergovernmental Financial Review.
(vi)	Broadbanding.	(vi)	Equity programmes.	(vi)	Interprovincial Staffing Task Team.
(vii)	Performance-related incentives.	(vii)	Counselling and Advisory Services.		
(viii)	Job enrichment strategies.				
(ix)	Dual career ladders.				

The arrangement of these recommendations into three categories above does not mean that they are dramatically opposed to each other. Most of these recommendations require a flexible approach and can be used interchangeably. For instance, the recommendations for recognition of competence can be applied for retention of teachers and vice versa. They complement each other.

## **6.6 LIMITATIONS OF THE STUDY**

Like any other study in the human sciences this project does not claim to be an authority in this field, but gives probabilities in the realities of human resources management and development in education. However, there are successes and contribution to the theory of human resources management and development. Nevertheless, there are limitations which stems from the course of the research and projected implementation problems generally.

For instance, this study was limited to principals, heads of departments and deputy principals, whereas other stakeholders such as school-governing bodies are important in the recognition of competence, empowerment and capacity building as well as retention. Teacher unions were not consulted – a component which is vocal on job security of teachers. Furthermore, the empirical investigation was only conducted in the Southern Region of the Northern Province. This will limit the prospects of implementation. However, the research findings might well suggest deep-rooted problems that relate to human resources management and development in education generally.

Furthermore, there were organisational limitations. At school level limitations experienced were as follows. First, there is a problem of how to distinguish between programmes for recognition of competence in primary schools and in secondary schools. The two organisational settings are not the same. Second, the stakeholders involved lacked clarity and definitions on change and transformation, and on how both concepts impact on education human resources management and development. Third, there were communication limitations first emanating from bureaucratic constraints and secondly from cultural restraints whereby most schools have no culture of collaboration

and teams. As such responses were either positively or negatively biased. The fear of losing power (by managers) and resistance to authoritative leadership (by teachers) affected the inquiry.

However, this does not mean that this research project does not hold water. Limitations are highlighted as a management mechanism for implementation of the findings and recommendations. Limitations elicit and stimulate further research.

## **6.7 FURTHER RESEARCH**

In the light of the limitations the researcher has encountered, an invitation for further research is extended to incumbents to investigate:

- Recognition of competence for primary school teachers and secondary schools separately.
- The level of competence of teachers in the former Model C schools or in rural or township schools.
- The influence of resources on teacher morale.
- The role of unions in the recognition of competence.
- The feasibility of site-based management as a means to empower teachers.
- Strategies to enhance accountability and while at the same time allowing school autonomy.
- Investigation of the link between learner failure and teacher trade unionism.
- Analysis of the professional role of teachers.

### **6.7.1 Future challenges for further research**

#### **6.7.1.1 *Management and leadership bug***

The serious challenge facing managers and leaders is to be Y2K compliant. Managers and leaders must develop their capacity and change attitudes and mindsets. It means that besides the conventional goals of planning, organising, leading and controlling

(management), managers must seek ways of coping with the complexity of organisations, creating order and stability in a volatile labour market. Managers must help organisations achieve their goals. This requires a focus on tasks to be performed (management of competence) and preponderate influence to create positive change (leadership). Most schools in South Africa are overmanaged and under-led (Lern & De Jager, 1999:2). To be Y2K compliant schools need people with leadership potential and who are exposed to career experience that develop them. Such an approach requires a combination of personality characteristics and behaviouristic schools of leadership. A Y2K manager needs to know more about him/herself.

Another challenge is a shift from the paradigm of resource centredness to people centredness. It means that teachers need to be regarded as assets not resources. The value attached to people will enhance their motivation level. This invokes the notion of managing for performance.

The productivity of the knowledge worker (teachers) is likely to become the centre of the management of people. This requires different assumptions about people in organisations and their work. And the goal is to make productiveness the specific strengths and knowledge of each individual. The hallmark of the recognition of the individual's strengths is that one can only perform with one's strengths. One cannot build performance on weaknesses, let alone on something one cannot do at all (Drucker, 1999:164). The great majority of human resources practitioners in education did not dare link recruitment and selection to productivity. Hence service in the entire public service is characterised by laxity. One enters a line of job and work, and that was it. Nothing more.

Perhaps the taxing challenge is to overcome intellectual arrogance which cause disabling ignorance. Far too many teachers – and especially those with specialisation in one area – are contemptuous of knowledge in other areas of the curriculum. They believe that being bright in one subject area is substitute for knowing. In fact research studies (Drucker, 1999:166) reveal that the main reason for poor performance is the result of simply not knowing enough, or the result of being contemptuous of knowledge outside one's own speciality. There is an urgent need for a teacher education

curriculum that will enable individuals to acquire sufficient skills and knowledge needed to make one's strengths fully productive or utilised.

In other words management will have to minimise prioritisation but focusing on an integrated approach to education and training. Likewise, what is needed is a redefinition of the scope of management. Management has to encompass the entire process of competence by shifting towards productivity while at the same time allowing for growth of teachers in different but related fields. In the same vein, education has to be folded into the economic chain. This requires school managers to understand that the results of school education – epitomised by school graduates – exist not only inside the school but outside as well – where productivity of schools becomes visible by skilled workforce. Therefore, management does not exist for the sake of institutional productivity but also for economic development as well. Hence there is a need for management to be concerned and become more responsible with everything that affects performance of the institution and its results – whether inside or outside the education fraternity.

#### **6.7.1.2 Certainties**

##### **1) The declining life expectancy**

An analysis of demographics points out that while First World countries experience a collapse in the birth rate, Sub-Saharan African states are threatened by a decline in life expectancy. In the Third World countries the death rate is likely to increase as the result of HIV-AIDS infections. Skilled human resources would be scarce. There is a likelihood of discharging a large number of skilled workforce who are rendered ineffective by ill health. It is crucial to research how the declining life expectancy is going to affect the availability of skilled and qualified personnel.

2) Shifts in the distribution of income

Recent studies conducted by Naidu (1999:8) reveal that teachers are earning less than bus drivers. There is a need to review the reward and compensation system so that teachers' competence is rewarded appropriately. Changes in distribution of income should resonate with broader economic transformation whereby the remuneration system is used as an instrument to redress disparities (Mahlangu & Gwexe, 1999:8). That South African society comprises of uneven and unequal halves is public knowledge. And that cannot be countenanced. The distribution of income should equitably narrow the gap between the rich and the poor. Further research in this regard should advance a mechanism for improvement.

3) Defining performance

Performance has become the buzzword in education. The rise in emphasis put on performance emanates from the need for a more accountable system of remuneration and reward so that the benefits teachers receive match their performance. The onus of proof in poor performance has become the flash point in labour relations. Employers cannot dismiss employees because of poor performance. Further research can be conducted on substantive fairness and procedural fairness. Given the militancy of teacher unions it is necessary for guidelines to be given in further research as to what constitute performance and how is that performance arrived at.

4) Global competitiveness

Further research can be undertaken on the role the education system can play in making the country globally competitive. It seems that the gap lies in compartmentalisation of programmes whereby education development programmes are not linked to general development of the society. Education development programmes should address economic and social problems. Hence the ideal of nation building is featured in recognition of competence. In real terms education development should address

- shortage of skills;
- accessibility of science and technology to all; and
- equality and equity issues.

Practically, it means that the education system should be managed in such a way that it addresses issues of poverty and unemployment. This requires investigation of ways and means of affording opportunities for low-skilled personnel, creation of wealth through entrepreneurship of scientists and technologists, galvanising government support and management, linking the academia close to the industry and introduction of basic science in the early phases of the education system.

Sustainable development requires a holistic approach to development. Therefore education programmes for development should be people- and community driven, and be perceived as part of human rights. Development is a human right. Thus, globalisation should be managed precisely to benefit all and sundry not the few.

#### **6.7.1.3 Emerging paradigms and trends**

The world in which we are living is marked by huge changes in paradigms and trends in the hope of making life easier and improve its quality. The same applies to education. Scientific discoveries and development are aimed at same – to improve life and make it better and easier. It is for this reason that:

- Quality has become an entrance requirement to teaching.
- More emphasis is placed on value for money (accountability) of services.
- The world economy has become seamless.
- There is a growth in choice and markets in education.
- Education focus embraces 'green' by emphasising social awareness about the fragility of the environment.
- There is a growing internationalisation of knowledge (Schwahn & Spady, 1998:4-5).

These trends and paradigms are a beacon for further research.

#### **6.7.1.4 Managing the virtual workplace**

When the trends, paradigms and implications discussed above are put together they make the transformation of the workplace inevitable. Increasingly sophisticated technology makes work and productivity less dependent on fixed locations, face-to-face interactions, and schedules. These changes affect the leadership styles of managers (as it is discussed above) such that they will manage people far less closely and change their role into a coach and facilitator (Bennett, 1999:1) who will empower staff by providing resources, and transcend barriers (Cronje, 1999:2).

Equally important is the change in the worker's role. His or her job will be far broader than the job description. They will do what they once relied on specialists to do. Cross training is required to make their jobs more fulfilling. They will be multiskilled – saddled with authority and responsibility to make decisions. In the same vein, researchers are invited to investigate the issue of the transfer of power to teachers by managers without the latter losing it. Ways should be established on creating a win-win situation. Seemingly control will lie dominant while trust will be the centre holding all team members. Hierarchical leadership will wither away.

Finally, further research should elicit innovation or suggest innovative ways to create change policy. In other words further research should enable managers to systematically deal with change and grab change opportunities by highlighting:

- organisations' own unexpected successes and unexpected failures;
- incongruities;
- process needs;
- changes in industry and market structures;
- changes in paradigms; and
- new knowledge.

Currently the introduction of change should be guided by practicability and feasibility as well as fiscal constraints. However, change should be enmeshed with continuity in order to address fears – of the unknown and uncertainty as well as losing conventional benefits. These will enhance the knowledge-worker's productivity – which is determined by factors such as that:

- Knowledge-workers have to manage themselves. They have to have autonomy.
- Continuing innovation has to be part of the work, the task and the responsibility of knowledge workers.
- Knowledge work requires continuous learning on the part of the knowledge-worker, but equally continuous teaching on the part of the knowledge worker.
- Productivity of the knowledge worker is measured by quality not quantity.
- Finally, knowledge-worker productivity requires that the knowledge-worker is both seen and treated as an "asset" than a "cost".

Change should be seen as an integral part of organisational management for the productivity of the knowledge-worker to be a reality. The attitude of the knowledge worker should be changed to build a professional capital required in the 21<sup>st</sup> century. Having said and discussed all these challenges and opportunities, it is important to point out that the areas for further research will change dramatically and also how research is conducted.

More aspects for further research can be looked for in reports from informal interviews (section 4.6), reports on findings from the literature study (summary in section 5.2.1) and from the survey (section 4.7).

## **6.8 CONCLUSION**

Recognition of competence is of prime importance in human resources management and development to address increasing demands on teachers and threats to their self-esteem. The greatest challenge is to ensure that human resources management and development are linked to productivity. Historically public enterprises including schools

followed recruitment and selection policies that have little to do with efficiency. Hence the low production character of many institutions. As such education organisations need to progressively reposition themselves in order to be productive and competitive nationally and globally. Hence public institutions are restructured to make them leaner and meaner so that they can meet the socio-economic challenges of globalisation and productivity with ease. However, the restructuring of organisations resulted in job losses – a factor which militates against job creation. Consequently, this project addresses the paradox of transformation and retain the workforce at the same time, and refocus the recruitment and selection practices to productivity. However, there are still some questions to be answered, arising out of the practice of retention. Questions such as the following come to the fore:

- How motivated are teachers?
- Do schools start teaching on the first day of a new term?
- Do schools start lessons on time?
- Are schools safe to overcome drugs and violence?
- Are parents actively involved in school governance?
- Is the business of the school conducted and managed to the benefit of all?

If answers to these questions are positive then the challenge remains on teachers' shoulders to get their act together. Teachers should attain tenure but not automatically.

The other challenge is to overcome the general trend of resistance against performance management, and that this process does not harass teachers and that timeous feedback is given. This requires approaches outlined in this project whereby all stakeholders' contributions are considered and valued. Finally, it can be concluded that recognition of competence is a model that is embedded in empowerment and capacity building to improve retention of teachers in the classroom. It considers factors such as contextual, experience, qualifications, curriculum, service and administrative factors with a view to development.

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## APPENDIX 1

### UNIVERSITY OF PRETORIA PhD QUESTIONNAIRE

#### RECOGNITION OF COMPETENCE : AN EMPOWERMENT MODEL FOR THE RETENTION OF EXCELLENT TEACHERS IN THE CLASSROOM

The aim of the research is:

1. To investigate human resources management factors that influence the quality of service in public education.
2. To identify ways and means of developing teachers so as to retain them.

#### ASSURANCE TO CONFIDENTIALITY

The respondent is assured confidentiality in this process. No name, address or telephone number is needed. Your answers will be treated with the utmost confidentiality. However, data regarding gender, post held, type of school, age will be needed for analysis. They are not needed for identification.

#### INSTRUCTIONS

1. Do not write your name on the answer sheet.
2. Circle the answer of your choice or write your answer in the space provided.
3. This questionnaire must be completed by all teachers – principals, deputy principals and heads of departments.
4. Learners are not considered for this research.



**PART A : BIOGRAPHICAL AND EDUCATIONAL DATA**

For Office use only

Card No V1

Questionnaire No:

V2

2 - 4

1. What is your gender?

Male	1	Female	2
------	---	--------	---

V3  5

2. How old are you?

years

V4  6-7

3. How many years have you been involved in education?

years

V5  8-9

4. Type of your school

Primary	1
Secondary	2

V6  10

5. What is your present position?

Principal	1
Deputy Principal	2
Head of Department	3
Teacher	4

V7  11

6. My experience in my current post is

years

V8  12-13

7. What is your highest qualification (circle one only)?

2 years education diploma	1
3 to 4 years diploma	2
B degree (3 to 4 years)	3
B degree and diploma	4
Honours degree	5
Masters degree	6
Doctoral degree	7
Other qualifications (specify) .....	8

V9  14



For Office use only

8. My field of specialisation in my qualifications is

Management	1
Science	2
Mathematics	3
Technology	4
Commerce	5
Humanities	6
Other field (specify)	7

V10   15-16

9. The present learner enrolment at my school is

0 - 478	1
479 - 839	2
839 - 1 159	3
1159 - 1 329	4
1329 - 1 644	5
1645+	6

V11  17

10. How many teachers are involved in teaching (excluding the principal)?

V12   18-19

11. In which geographical area is your school situated?

In a city	1
In a township	2
In an informal settlement	3
On a farm	4
In a rural village	5

V13  20

## PART B : RECOGNITION OF COMPETENCE

In this section, our aim is to determine the challenges that management and teachers encounter and are adverse to quality education.

Indicate your feelings of the reasons for teachers entering teaching by circling either **agree**, **neutral** or **disagree**. Circle one option in each case.

For Office use only

1. Reasons for entering teaching

To have a personally satisfying job	1	2	3	V14	21
To have a high-paying job	1	2	3	V15	22
To make a contribution to the society	1	2	3	V16	23
To be of service to children	1	2	3	V17	24
To have more time off during the year	1	2	3	V18	25
To pursue an interest in a particular subject	1	2	3	V19	26
To have a backup job while pursuing another career	1	2	3	V20	27
To work in a noble, moral and ethical profession	1	2	3	V21	28
To pursue an interesting career with interesting colleagues	1	2	3	V22	29
To have job security and a steady income	1	2	3	V23	30
I like children or youths	1	2	3	V24	31
I didn't know what else to do with my college education	1	2	3	V25	32
I didn't think there was any career open to me	1	2	3	V26	33
I was influenced by my friends and/or family	1	2	3	V27	34

2. Commitment to teaching as a lifelong career

1. Indicate whether you **agree**, are **neutral** or **disagree** with features of a teaching career that **satisfy you most**. Circle one option in each case.

Holidays	1	2	3	V28	35
Opportunity to practice one's own ideas	1	2	3	V29	36
Economic security	1	2	3	V30	37
Staff/pupil relationships	1	2	3	V31	38
Working hours	1	2	3	V32	39

For Office use only

2. Which of the following offer teachers prospects of career retention? Circle one option only.

Management	1
Curriculum	2
Teacher-pupil ratio	3
Affirmative action	4
Technology	5

V33  40

3. Which of the following remain a threat to your continued service in teaching? Circle one option only.

Management	1
Curriculum	2
Teacher-pupil ratio	3
Affirmative action	4
Technology	5

V34  41

4. What is the most **unsatisfactory aspect of teaching?**

Circle one option only.

Class size and workload	1
Status of the profession in society	2
Promotion prospects	3
Extent of non-professional work	4
Overwhelming changes	5

V35  42

Indicate your rating of the **current situation** at your school.

The following scale is used. Circle one option in each case.

Highly satisfactory	1
Satisfactory	2
Uncertain/do not know	3
Not satisfactory	4
Highly unsatisfactory	5

3. Reward and compensation

The rate at which promotion occurs	1	2	3	4	5
Intrinsic rewards used in teaching	1	2	3	4	5
Extrinsic rewards used in teaching	1	2	3	4	5

V36  43

V37  44

V38  45

Teachers seek promotion because

It is a logical step in attaining career goals	1	2	3	4	5
It is a form of motivation derived from accumulated experience to perform even better	1	2	3	4	5
It provides a means of salary increment	1	2	3	4	5

V39  46

V40  47

V41  48



**For Office use only**

It is a challenge to perform better than others	1	2	3	4	5
It is a matter of pride and competence	1	2	3	4	5
It is a means of recognising competence	1	2	3	4	5
It gives more influence in day to day running of the school.	1	2	3	4	5
It increases one's freedom and power	1	2	3	4	5

V42		49
V43		50
V44		51
V45		52
V46		53

Answer each question to show how you feel by circling the number of the statement which describes your opinion. The following scale is used.

Very often	1
Rarely	2
Seldom	3
Never	4

4. Career contingency factors

Being male is regarded as a distinct advantage	1	2	3	4
Having a degree, preferably from a university, is believed to give a teacher advantage in selection	1	2	3	4
It is believed that teachers are unlikely to gain promotion within one school	1	2	3	4
Teachers are willing to move between schools in a restricted geographical region that is within commuting distance of their place of residence	1	2	3	4
Further study favours promotion	1	2	3	4
Making a contribution outside the classroom, through extra-curricular activities, augurs well for career advancement	1	2	3	4
Experience is considered an indication of one's competence	1	2	3	4
There is willingness in teachers to work in rural areas	1	2	3	4

V47		54
V48		55
V49		56
V50		57
V51		58
V52		59
V53		60
V54		61

For Office use only

5. Indicate whether you **agree**, are **neutral** or **disagree** with each of the **possible reasons for leaving teaching**. Circle one option in each case.

Inadequate, low salary	1	2	3
No chance for advancement	1	2	3
Opportunity to do something else more rewarding	1	2	3
Poor working conditions	1	2	3
Student-related problems	1	2	3
Management and administration-related problems	1	2	3
Lack of respect (low status)	1	2	3
Emotional aspects (e.g. stress, frustration)	1	2	3

V55  62  
 V56  63  
 V57  64  
 V58  65  
 V59  66  
 V60  67  
 V61  68  
 V62  69

**PART C : EMPOWERMENT**

1. Management principles

Indicate your feelings about the prevailing situation in your school. If you **agree**, circle **1**, and if you **don't agree**, circle **2**.

	Agree	Disagree
One should ignore certain faults in the work of subordinates in order not to discourage them.	1	2
I spend too much time sorting out problems that my subordinates ought to be able to deal with.	1	2

V63  70  
 V64  71

			For Office use only	
	Agree	Disagree		
If anyone finds any fault with my work I would prefer that he or she tells me face-to-face.	1	2	V65	72
It is difficult to execute many education office decisions.	1	2	V66	73
Many of our most important decisions are based on insufficient information.	1	2	V67	74
A good manager is the one who shares decision-making and work.	1	2	V68	75
I am willing to let my staff decide on teaching routine activities.	1	2	V69	76
I take pride in my teachers.	1	2	V70	77
Our organisation values teachers resolving conflict in a healthy way.	1	2	V71	78
Teachers must be self-educated and empowered to enable them to cope with transformation challenges.	1	2	V72	79
I am willing to let my staff decide on policy matters.	1	2	V73	80
I am concerned about my teachers' welfare.	1	2	V74	81
Managers must be facilitators in the process of transformation.	1	2	V75	82

2. Empowering school management models

Indicate your feelings or emotions about the current situation of the relationship between the school and the district. The following scale is used:

Always	1
Often	2
Seldom	3
Never	4

All teachers, principals, deputy and HODs may complete this section by circling on the appropriate space provided.

To what extent does the district/area manager:



For Office use only

Value commitment to the development of the individual within the district?	1	2	3	4	V76		83
Value treating all individuals as significant stakeholders in the organisation?	1	2	3	4	V77		84
Value a 'we' spirit and feeling of ownership in the organisation?	1	2	3	4	V78		85
Value empowering employees to support information and resources?	1	2	3	4	V79		86
Value all employees as equally important members of the organisation?	1	2	3	4	V80		87
Believe that employees act in the best interest of students and the organisation?	1	2	3	4	V81		88
Value employees as having the expertise to make wise decisions?	1	2	3	4	V82		89
Value investing in the development of employees?	1	2	3	4	V83		90
Value placing decision-making as close to the point of implementation as possible?	1	2	3	4	V84		91
Value honesty in words and actions?	1	2	3	4	V85		92
Value the unwavering commitment to ethical conduct?	1	2	3	4	V86		93
Value difference in individual philosophy and practices?	1	2	3	4	V87		94
Value commitment to redress past imbalance in human and physical resources?	1	2	3	4	V88		95
Value allocating resources equitably?	1	2	3	4	V89		96
Value consistent and responsible pursuit of non-racialism and non-sexism?	1	2	3	4	V90		97
Value support for school development plans?	1	2	3	4	V91		98
Value involvement, partnerships and networks as basic tenets for quality education?	1	2	3	4	V92		99
Value commitment to the culture of teaching and learning?	1	2	3	4	V93		100

For Office use only

3. Change management

Indicate whether you agree or disagree with the following Statements. Circle your choice.

	Agree	Disagree			
I always tell teachers why changes are made.	1	2	V94	<input type="checkbox"/>	101
I like to be told exactly how I am to do my job.	1	2	V95	<input type="checkbox"/>	102
I believe that rational, logical thinking should win the day.	1	2	V96	<input type="checkbox"/>	103
I am keen to try things out to see if they work in practice.	1	2	V97	<input type="checkbox"/>	104
If can't do a new task in my job, I keep trying until I can.	1	2	V98	<input type="checkbox"/>	105
I give up on things before completing them.	1	2	V99	<input type="checkbox"/>	106
I avoid facing difficulties	1	2	V100	<input type="checkbox"/>	107
If something looks too complicated, I will not bother to try it.	1	2	V101	<input type="checkbox"/>	108
When I have something unpleasant to do, I stick to it until I finish it.	1	2	V102	<input type="checkbox"/>	109
When trying to learn something new, I soon give up if I am not initially successful.	1	2	V103	<input type="checkbox"/>	110
When unexpected problems occur, I don't handle them well.	1	2	V104	<input type="checkbox"/>	111
Failure just makes me try harder.	1	2	V105	<input type="checkbox"/>	112
I feel insecure about my ability to do things.	1	2	V106	<input type="checkbox"/>	113
There really is no such thing as a problem that can't be solved.	1	2	V107	<input type="checkbox"/>	114
Teachers are still in the dark about curriculum changes.	1	2	V108	<input type="checkbox"/>	115
Most of the short courses on curriculum changes are trivialised by lack of resources.	1	2	V109	<input type="checkbox"/>	116
It is possible to implement changes at school.	1	2	V110	<input type="checkbox"/>	117
Teachers need to improvise to keep the education system going.	1	2	V111	<input type="checkbox"/>	118
I feel very enthusiastic about changes in my job.	1	2	V112	<input type="checkbox"/>	119
I would stay in teaching if it were not for these changes.	1	2	V113	<input type="checkbox"/>	120

	Agree	Disagree	For Office use only	
I have difficulty working in a new and unfamiliar situation.	1	2	V114	121
Learning new skills doesn't excite me very much.	1	2	V115	122

4. Teams, partnerships and networks.

Indicate the frequency of the situation or behaviour among teachers in your school by circling one option in each case.

The following scale is used:

Almost always	1
Quite often	2
Hardly ever	3
Never	4

We are involved in decision-making at our school.	1	2	3	4	V116	123
There is a free flow of ideas in our groups.	1	2	3	4	V117	124
Ideas are judged on merit rather than their source.	1	2	3	4	V118	125
Our meetings include everyone who needs to attend.	1	2	3	4	V119	126
Authority and responsibility are shared.	1	2	3	4	V120	127
Teachers are encouraged to partner and network.	1	2	3	4	V121	128
Other stakeholders are encouraged to contribute.	1	2	3	4	V122	129
Consensus, rather than compromise guides decision-making.	1	2	3	4	V123	130
I am a self-reliant person.	1	2	3	4	V124	131
It's difficult to remain excellent in a group.	1	2	3	4	V125	132
I do not do well in groups.	1	2	3	4	V126	133
I am prepared to listen and co-operate.	1	2	3	4	V127	134
Groups give more pleasure in tackling work.	1	2	3	4	V128	135
Groups offer stimulating ideas about teaching.	1	2	3	4	V129	136
Schools should partner with tertiary institutions.	1	2	3	4	V130	137
Schools should network with business.	1	2	3	4	V131	138
Schools should partner with parents.	1	2	3	4	V132	139
Partnerships with unions can better minimise strikes.	1	2	3	4	V133	140

5. Excellence in teaching

Every teacher strives to be excellent. It may be in extra-curricular activities or academic life of the school. Indicate your beliefs about teachers in each of the following statements: (circle your option)

Teachers are punctual, dedicated and self-disciplined.	1	2	V134	141
Teachers offer quality lessons and assessment.	1	2	V135	142
Teachers do an excellent quality job despite insufficient resources.	1	2	V136	143
Teachers contribute to the decline in quality education by their inadequate planning, control and organisation.	1	2	V137	144
Despite all odds teachers are enthusiastic about their jobs.	1	2	V138	145
Teachers have no say in matters that directly affect them in the classroom.	1	2	V139	146
Teachers are involved in unions to cover their inefficiency and ineffectiveness.	1	2	V139	147
Teachers are demoralised by lack of commitment from learners.	1	2	V141	148
Teachers are over-burdened by the new system (curriculum 2005)	1	2	V142	149

**THANK YOU FOR YOUR PARTICIPATION.**

**NORTHERN PROVINCE  
EDUCATION, ARTS, CULTURE AND SPORTS  
SOUTHERN REGION**

**AREA OFFICES**

NAME	ADDRESS	NUMBER OF SCHOOLS	
1. APEL	The Area Manager Apel Area Private Bag X12 APEL 0739	Pre-primary =	30
		Primary =	47
		Secondary =	31
		Private =	1
		Tertiary =	<u>1</u>
		<b>TOTAL =</b>	<b>110</b>
2. BOHLABELA	The Area Manager Bohlabela Area Private Bag X1009 BURGERSFORT 1150	Pre-primary =	15
		Primary =	62
		Secondary =	49
		Tertiary =	<u>1</u>
		<b>TOTAL =</b>	<b>127</b>
3. DENNILTON	The Area Manager Dennilton Area Private Bag X647 GROBLERSDAL 0470	Pre-primary =	36
		Primary =	64
		Secondary =	38
		Special =	1
		Tertiary =	1
		Technical Coll =	<u>1</u>
		<b>TOTAL =</b>	<b>141</b>
4. MAGAKALA	The Area Manager Maglakala Area Private Bag X12 ATOK 1150	Pre-primary =	25
		Primary =	88
		Secondary =	48
		<b>TOTAL =</b>	<b>161</b>
5. NEBO	The Area Manager Nebo Area Private Bag X1220 NEBO 1059	Pre-primary =	46
		Primary =	70
		Secondary =	36
		Private =	<u>1</u>
		<b>TOTAL =</b>	<b>153</b>
6. SEKHUKHUNE	The Area Manager Sekhukhune Area Private Bag X1220 SEKHUKHUNE 1124	Pre-primary =	32
		Primary =	70
		Secondary =	36
		Private =	<u>2</u>
		<b>TOTAL =</b>	<b>140</b>

Year Compiled: 1997

**INFORMAL INTERVIEW QUESTIONNAIRE**

**1. Academic background**

- 1.1 What field of specialisation are your qualifications?
- 1.2 Do you think you are/were ready to assume management post?
- 1.3 What problems do you encounter in your practice as a manager?

**2. Parental involvement**

- 2.1 Are parents actively involved in the management of the school?
- 2.2 What is the cause, according to the answer above?
- 2.3 What is the attitude of teachers towards parental involvement?

**3. Teachers' morale**

- 3.1 Do you think teachers are enthusiastic about their jobs?
- 3.2 What might have contributed to low morale?

**4. Communication**

- 4.1 Do you think there is effective communication between schools and the department of education?
- 4.2 Why?

**5. Appointment/Redeployment and Job security?**

- 5.1 Are appointments handled properly by the department?
- 5.2 Which problems are encountered in the appointment process?
- 5.3 Do you think redeployment is handled successfully? Identify the problems associated with redeployment.



**6. Provision and supply of resources**

6.1 Are you sufficiently resourced in terms of books?

6.2 What do you think might be the problem?

**7. Leadership**

7.1 Is principal in control of the institution?

7.2 What leadership problems do you encounter in your school?

**8. Trade unions**

8.1 Are the members of your staff affiliates to trade Unions?

8.2 What do you think as the main contributor to rise in trade unionism among teachers?

8.3 What problems do you encounter with trade unions?

**9. Empowerment**

9.1 Are there staff empowerment programmes? Are they enough?

**10. Rewards**

10.1 Are the rewards offered to teachers enough?

10.2 Why?

**11. Learner representation**

11.1 Do you have any representation for learners in the governance structure of your school?

11.2 What problems do you encounter with this structure?

**NORTHERN PROVINCE  
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SOUTHERN REGION**

**AREA OFFICES**

<b>NAME</b>	<b>ADDRESS</b>	<b>NUMBER OF SCHOOLS</b>	
1. APEL	The Area Manager Apel Area Private Bag X12 APEL 0739	Pre-primary = 30 Primary = 47 Secondary = 31 Private = 1 Tertiary = <u>1</u> <b>TOTAL = 110</b>	
2. BOHLABELA	The Area Manager Bohlabela Area Private Bag X1009 BURGERSFORT 1150	Pre-primary = 15 Primary = 62 Secondary = 49 Tertiary = <u>1</u> <b>TOTAL = 127</b>	
3. DENNILTON	The Area Manager Dennilton Area Private Bag X647 GROBLERSDAL 0470	Pre-primary = 36 Primary = 64 Secondary = 38 Special = 1 Tertiary = 1 Technical Coll = <u>1</u> <b>TOTAL = 141</b>	
4. MAGAKALA	The Area Manager Maglakala Area Private Bag X12 ATOK 1150	Pre-primary = 25 Primary = 88 Secondary = 48 <b>TOTAL = 161</b>	
5. NEBO	The Area Manager Nebo Area Private Bag X1220 NEBO 1059	Pre-primary = 46 Primary = 70 Secondary = 36 Private = <u>1</u> <b>TOTAL = 153</b>	
6. SEKHUKHUNE	The Area Manager Sekhukhune Area Private Bag X1220 SEKHUKHUNE 1124	Pre-primary = 32 Primary = 70 Secondary = 36 Private = <u>2</u> <b>TOTAL = 140</b>	

## STRATIFIED RANDOM SAMPLE

### RESEARCH PROGRAMME

#### SAMPLES

AREA	NUMBER OF SCHOOLS		
1. APEL	Primary	=	5
	Secondary	=	10
2. BOHLABELA	Primary	=	10
	Secondary	=	10
3. DENNILTON	Primary	=	20
	Secondary	=	15
4. MAGAKALA	Primary	=	10
	Secondary	=	10
5. NEBO	Primary	=	20
	Secondary	=	15
6. SEKHUKHUNE	Primary	=	15
	Secondary	=	<u>10</u>
	TOTAL	=	<b>170</b>

#### FIELDWORK DATES

##### First Block

##### Dates

Dennilton

Nebo

Sekhukhune

17 January 2000 to 21 January 2000

##### Second Block

##### Dates

Apel

Bohlabela

Magakala

24 January 2000 to 28 January 2000

## RESEARCH ACTIVITIES

1. Interviews
2. Dissemination of questionnaires
3. Collection of questionnaires
4. Giving support to respondents

## RESEARCH FIELDS

1. Schools
2. Area offices
3. Circuit offices
4. Principal's meetings