

**EDUCATORS AND SCHOOL GOVERNING BODIES' PERCEPTIONS ON
RATIONALISATION AND REDEPLOYMENT IN THE ALFRED-NZO WEST
DISTRICT: ADVANCING AN ARGUMENT FOR POLICY CHANGE**

BY

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Submitted in fulfilment of the requirements for the degree of

DOCTOR OF PHILOSOPHY (PhD): EDUCATION



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UNIVERSITY OF FORT HARE (UFH)
Together in Excellence

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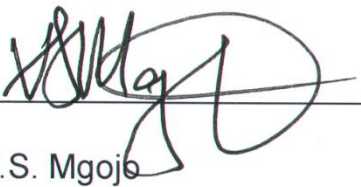
JANUARY 2019

DECLARATION

I, Vuyani Sybriel Mgojo, student number: 201415720, declare that:

EXPLORING EDUCATORS AND SCHOOL GOVERNING BODIES' PERCEPTIONS ON RATIONALISATION AND REDEPLOYMENT IN THE ALFRED-NZO WEST DISTRICT: ADVANCING AN ARGUMENT FOR POLICY CHANGE

submitted to the University of Fort Hare is my own original work and has never been submitted to any other institution of higher education before. I further declare that all sources cited and quoted are indicated and duly acknowledged by means of a comprehensive list of references.


V.S. Mgojo

06/09/2019
DATE

DEDICATION

I dedicate this work to my late father, Abel Mokete Mgojo, who always wished that one day I would be successful and learn. To my masters' degree supervisor, Dr M.P. Cekiso, who enhanced my confidence and encouraged me to register for my PhD studies, 'Your words never fell on deaf ears, Mkhontobomvu'. I also dedicate this work to my loving mother, 'Madlomo' who has made a massive contribution in my entire life. Were it not for her undying support when I grew up, I would have not been who I am today.



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I acknowledge with gratitude the support of the following people: -

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- Dr Z. Mnukwa for always keeping me on my toes.



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ABSTRACT

The focus of this study was to report on the exploration of educators and school governing body members' perceptions on the aspects of rationalisation and redeployment in the Alfred Nzo West District. In 1996 the Department introduced a policy on rationalisation and redeployment of teachers, based on Resolution 3 of the Education Labour Relations Council (ELRC) with the aim of phasing in a learner – teacher ratio of 40:1 in primary schools and 35:1 in high schools. A case study design using a qualitative approach was adopted for the study. Data was gathered from ten purposively selected participants using semi-structured interviews, observations and documents reviews. A thematic approach was followed for the data analysis of this study. The overall findings of the study showed that the Department of Education followed a top-down approach with no interactive communication and consultation with school stakeholders during the implementation process of this policy. Participants cast doubt on principals' understanding when implementing this policy, which inevitably leads to low morale, anxiety and uncertainty amongst teachers. It appears that this policy has not been internalized as an instrument to promote quality and access to schools, as it has been argued that the implementation thereof has resulted in lack of physical and human resources which is compromising the quality of teaching and learning. Moreover, participants were ambivalent about rationalisation and redeployment as an enabler and as a barrier to improvement as some participants view it as an alternative to retrenchment and a cost saving measure for the Department of Education. Given the aforementioned findings, it can be concluded that if the aims of rationalisation and redeployment are to be achieved, there is a need for policy change.

Key words: Educators, Rationalisation, Realignment, Redeployment, School Governing Body.

LIST OF ABBREVIATIONS AND ACRONYMS USED

ANC	African National Congress
CAO	Chief Administrative Officer
CEU	Church Education Unit
COSATU	Congress of South African Trade Unions
DoE	Department of Education
DP	Deputy Principal
ECDoE	Eastern Cape Department of Education
EEA	Employment of Educators Act
ELRC	Education Labour Relations Council
EMIS	Education Management Information System
ESSP	Education Sector Strategic Planning
FAL	First Additional Language
FET	Further Education and Training
FNBoE	Finnish National Board of Education
FP	Foundation Phase
FTI	Fast Tracking Initiative
GDP	Gross Domestic Products
GEAR	Growth Employment and Redistribution
GES	Ghana Education Service
GET	General Education and Training
HoD	Head of division (school-based)

ISA	Ideological State Apparatus
J.S.S	Junior Secondary School
LIFO	Last in First Out
LMS	Local Management of Schools
MEC	Member of the Executive Committee
MoE &S	Ministry of Education and Sport
NEPA	National Education Policy Act
NNS	National Norms and Standards
PAM	Personnel Administrative Measures
PED	Provincial Education Department
PPN	Post Provisioning Norms
PTR	Pupil Teacher Ratio
RSA	Repressive State Apparatus
RSA	Republic of South Africa
SA	South Africa
SADTU	South African Democratic Teachers Union
SAP	Structural Adjustment Programme
SASA	South African Schools Act
SB	School Boards
SG	Superintendent-General
SGB	School Governing Body



SIDRU	Saskatchewan Instructional Development and Research Unit
SMTs	School Management Teams
SP	Senior Phase
STR	Student Teacher Ratio
VSP	Voluntary Severance Package



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CHAPTER ONE

CONTEXTUALISATION AND ORIENTATION OF THE STUDY

1.1 Introduction

Teachers are central to the teaching and learning process (Rizwan, 2015). This is corroborated by Owen, Kos and McKenzie (2008) when asserting that teachers are the most significant resource in schools. An inadequate number of teaching staff irrevocably leads to a high student teacher ratio (STR), commonly known as pupil teacher ratio (PTR). Commentators on education issues contend that smaller classes are more manageable for teachers and allow them more time to focus on students' individual needs (OECD, 2011). According to Rizwan (2015) of "The Express Tribune" in Pakistan, the global best practice suggests a PTR of 25:1. The PTR is calculated by dividing the total number of students by the total number of teachers available to serve them. However, this formula masks the number of students and teachers per class (Rizwan, 2015).

Citing the benefits of teacher rationalisation, the author avers that the government's scarce financial resources will be utilized efficiently because need-based transfers of excess staff can fill the vacant posts in schools where additional staff are required. The second reason Rizwan (2015) advances is that human resources will be utilized optimally as the reallocated extra staff can use their time teaching in schools that need their services. The second last benefit advanced is that accurate data can help the government to deploy need-based subject specialists in schools and streamline continuous professional development for serving teachers. Lastly, Rizwan (2015) concedes that the government can assess the number of vacant posts and recruit new teachers to address teacher shortages in the system.

In South Africa, the demise of apartheid in 1994 saw the formation of a single non-racial education department, and also the need to address the imbalances of the past in terms of

human and material resources (Zengele, 2009). This had to be based on certain legal policies and lawful documents such as the Constitution (Act 108 of 1996) of the country, which is the Supreme Law, the National Education Policy Act (NEPA, 27 of 1996), the South African Schools Act (SASA, 84 of 1996), the Employment of Educators Act (EEA, 76 of 1998) and resolutions made in the bargaining chambers. According to NEPA, the Minister of Education may determine the ratio between educators and students while Section 29 of the Constitution states that all children have a right to basic education irrespective of their geographical location. On the other hand, the Schools Act (Act 84, 1996) in Section 12A provides for a merger of two or more schools if they are deemed unviable in terms of learner numbers and Section 33 for the closure of public schools. The Employment of Educators Act (Act 76, 1998) allows Provincial Member of the Executive (MEC) for Education the right to distribute educators over post levels in a particular reporting year. The enactment of these Acts by the Government of the African National Congress (ANC) made it possible for learners from disadvantaged rural schools to move to well-resourced town and urban schools, the former Model C schools.



This exodus of learners from the poorly to better-resourced schools led to educators being redundant and to be declared in excess because of decreased learner numbers in poorly-resourced schools. In order to avert retrenchment as a result of redundancy, the Department of Education and Teacher Unions that meet the benchmark in the bargaining chamber, the Education Labour Relations Council (ELRC), a process of redeployment of teachers was agreed upon. The number of learners per school was to be used to determine the number of educators a particular school deserves for that particular year. This brought fears and anxiety amongst educators as they felt uncertain and insecure about their future in the Department of Education (Chudnovsky, 1998).

However, the implementation process was never a smooth one as there were contestations from various stakeholders. The same teacher unions that were part of the agreement, the South African Democratic Teachers Union (SADTU), contested the implementation of the agreement. They argued that to agree to the incentives for teachers to leave the profession when millions of students were in very large classes was irresponsible (Chudnovsky, 1998). This was further strengthened by saying that the money spent on voluntary severance

packages (VSP) could be used to improve the system. The Grove Primary School's case (1997) is one example of contestation advanced by stakeholders to show their dissatisfaction with rationalisation and redeployment of teachers. The court had to rule in favour of the School Governing Body (SGB), which also led to the proclamation of the Education Laws Amendment Act of 1997, to further guide the procedure for rationalisation and redeployment of teachers. It was also reported in the *Mail and Guardian* in 2014 that a core group of public-interest organizations had litigated a string of cases against the South African government to fight for improved provisioning of education in under-resourced schools (Veriava, 2014). The author further notes that these cases focused on improving school infrastructure, requiring the delivery of textbooks, desks and chairs and ensuring that there are adequate numbers of teachers in schools. Recently, that is, in 2016, section 33 of SASA is beginning to take momentum in preparation for the coming year, but the focus of this study is on rationalisation and redeployment of teachers, let alone that section 12A and 33 of SASA also exacerbate the issue at hand.



1.2 Background

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What does rationalization and redeployment mean in practice? Eris (2011) asserts that maintaining large numbers of several stakeholders, including teachers and administrators where only a few learners are enrolled, is a waste of valuable public resources. It is against this background that rationalization and redeployment was viewed as a necessity in Slovenia, where the merging and closing of schools as well as the extension of catchment areas were seen as a better option to reduce operational costs (Eris, 2011). Based on this perspective, a number of teaching and professional support staff had to be rationalized and mechanisms such as rationalization and redeployment aimed at normalizing the workload and resources across schools and cutting down on costs was introduced (Eris, 2011).

Griggs and Hyland (2002) argue that downsizing is a way of life in organizations today. They further contend that in Australia, like any other developed country, such initiatives are often taking place within large organizations that had in the past enjoyed a degree of immunity from retrenchment. This fits in well with the principles of rationalization and redeployment laid down

in South Africa, as there would be no retrenchments on the side of teachers declared additional to their institutions (Resolution 3 of 1993, RSA). Laabs (1999) cited by Griggs and Hyland (2002) affirms that since the mid-1980s employment downsizing has been regarded as the preferred route to improving organizational performance. Griggs and Hyland (2002), citing Serving American Best Practice in Downsizing (1997), further contend that the success or failure of downsized organization depends on the workforce remaining after downsizing.

Molale (2004) opines that policy-makers and politicians are focused on the desired outcomes of educational change but neglect the contextual factors that influence implementation. This is further augmented by the research conducted in the Western Cape by Boughardt (2011), where teachers confirmed that the workloads of those who remain at school are increased by rightsizing. This means that the work of the person who has been redeployed has to be redistributed amongst the remaining teachers on that post level at the school (Boughardt, 2011). Boughardt (2011) further asserts that teachers opted for the VSP as they saw it as a better option than being redeployed to schools far away from their homes.

In line with the rationalization and redeployment of teachers in South Africa, in 2015 the Chancellor of the University of Wisconsin-Platteville commented in his message that among reasons for the university to undertake realignment and reorganization of administrative units was to allow the university to manage the budget reductions effectively and run its operations as effectively as possible while maintaining adequate staffing to achieve their mission (Shields, 2015). He went on to say that new positions would not be created; instead the current staff would be restructured. Several divisions were merged and fused into one office. For instance, the Advancement division which was taking care of Alumni Services, Advancement, and University Information and Communication was renamed External Relations. The External Relations would be responsible for improved communication with elected officials at the state and federal levels, advocate on behalf of the university, and inform on legislation that impacts the University of Wisconsin-Platteville (Shields, 2015). This is similar to the rationalization and redeployment process in South African schools where, in the early stages of this process, there were no newly created posts, but personnel movement. This movement of personnel later resulted in the closing down and merging of schools.

The public education system in South Africa has been in the process of far-reaching restructuring and is still witnessing a plethora of policies initiating and seeking educational change (Smit, 2001). Rationalization in schools was introduced in an attempt to *inter alia* streamline and improve results in the affected Eastern Cape schools (ECDoE, 2007). This remains to be seen as Schleicher (2007) espouses that in New Zealand, overhauling the structure of the education system did not bring any change in the academic performance of learners, as one of the policy-makers even commented that they were naïve to think that change of structure would improve classroom quality. In terms of Section 29 of the Constitution of South Africa (1996), all children have a right to basic education, irrespective of their geographical location. In order to achieve this goal, the report of the Ministerial Committee on Rural Education (2005) proposed through a report titled “A New Vision for Rural Schooling”, 82 specific recommendations to address rural school challenges (KwaZulu Natal, 2014). Furthermore, the Department of Education (DoE) also provided guidelines for the rationalization of small rural and farm schools, including closures, mergers and expropriation (DoE, 2009). The South African Schools Act (SASA), No 84 of 1996, Section 12A, provides for the closure of public schools when learner numbers decline. According to the DoE, the merger and closure of rural and farm schools aims at improving the quality of education, expedite the resources to schools, promote access to schools and ensure the retention of learners and educators in rural and farm schools (Directorate: Rural Education, 2009). It is the researcher’s observation that closures and mergers of unviable schools is an appropriate step towards achieving efficient and effective teaching and learning. Such schools are difficult to staff hence the existence of one or two teacher schools, yet subjects and learning areas are never reduced. This translates into ineffective teaching and learning due to high workloads and lack of certification in most subjects and/or learning areas among the remaining teachers.

In 1996, the DoE introduced policy on rationalisation and redeployment of teachers based on Resolution 3 of the Education Labour Relations Council (ELRC) with the aim of phasing in a learner to teacher ratio of 40:1 in all primary schools and 35:1 in all secondary schools (Chisholm, 2004). Implementation was met with challenges. There was resistance to move to poorer-resourced parts of the system by teachers from better-resourced parts of the system and this created an increase in the number of teachers employed by School Governing Bodies

(SGBs) (Chisholm, 2004). Among other challenges, there was resistance from affluent schools to employ teachers from the redeployment list, regardless of their qualifications and experience (Chisholm, 2004).

In 1997, Grove Primary School and eighty other schools in Cape Town challenged the redeployment policy in the Cape High Court, which led to implementation of the Education Laws Amendment Act of 1997. According to Mthombeni (2002), this Act was an important measure for the implementation of the policy of equity and redress of education provision. As a regulatory body, the ELRC (1998) set out norms that provide a broad framework which forms the basis for transformation and which is framed by four main resolutions, viz;

- Resolution 5/98: Transfer of serving educators in terms of operational requirements and advertising and filling of educator posts;
- Resolution 6/98: Procedure for rationalisation and redeployment;
- Resolution 7/98: Workload for school-based educators and
- Resolution 8/ 98: Duties and responsibilities of educators.

Mthombeni (2002) asserts that Resolution 6 of 1998 is the most important resolution as it sets out the procedure for rationalisation and redeployment. All provincial departments of education therefore have to proceed with rationalisation and redeployment in terms of this resolution.

The rationalisation and redeployment process that was re-introduced in schools by the ECDoE in 2014 sought to streamline the province's shambolic education system by realigning and reorganizing schools by moving Grades eight (8) and nine (9) learners from primary schools that were dubbed 'Junior Secondary Schools' to the Secondary Schools. This led to a new concept in the education circles, the 'Realignment of schools'. The concept of 'realignment of schools' was informed by the National Prototype for schools in South Africa (2009), which further strengthens the plan to redeploy teachers. A radical plan by the ECDoE to change the current configuration in the former Transkei region through public hearings for "schools rationalisation and re-alignment programme" culminated in phasing out of the current mixed schooling system as primary schools clubbed with secondary classes (Grades 8 and 9), leading to huge primary schools, operating from Grade R to 9 (DoE, 2009). In line with this

plan, learners in Grades 8 and 9 were moved from the then so-called Junior Secondary Schools (JSS) into Secondary Schools. Teachers were also redeployed as the number of learners declined in those primary schools.

However, there is a considerable variation in the demographic responsiveness of the education systems. According to Bartl (2014), demographic change is usually perceived as a challenge for modern societies because of the inherited social structures that tend to become inadequate for populations changing significantly in size or age composition. Bartl (2014) further states that a decline in population numbers will lead to less demand for education services. Under the assumption of political and administrative regard for economies of scale, it is hypothesized that demographic decline creates pressure to economize on oversized education infrastructures (Bartl, 2014).

Furthermore, rural schools are said to be more prone to school closures, as their settlement structure does not allow for economies of size (Aberg-Bengsston, 2009). However, low enrolment and high unit costs are not always the main reasons for the merger or closure of schools. Kramer (1997), Frank (2011), Billger (2010) and Engberg (2012) assert that professional ideas guiding education policy, issues of social inequality and student achievement and political resistance by communities affected often prove to be more important than purely economic reasoning. The Ministerial Committee Report on Rural Education (2005) highlighted the urgent need for redress in rural schooling, and suggested specific recommendations to address the challenges. The Rural Education Directorate established in 2007, drafted the National Guidelines for Rationalisation of small and non-viable schools which was supported by Provincial Rural Co-ordinators and address *inter-alia* the merger and closure of rural and farm schools. From the researcher's experience as a school principal, he has observed how the redeployment and rationalization process led to a decline in teachers' morale with many describing this process as the lowest in their careers. Soudien (2001) concurs with this view and asserts that many teachers surveyed in the Western Cape perceived the introduction of rationalisation as just another burden which they were forced to carry. It can thus be argued that restructuring of schools by no means automatically implied reform, on the contrary, it meant further hardship.

According to Smit (2001), teachers who are key role players in the implementation phase are more often than not the silent voices in the process, ignored and often discounted at this stage of educational change. Autti and Hyry-Beihammer (2014) argue that the school closure process includes formal communication (e.g. public hearings) between those in power and members of the community, but too often participatory processes are only meant to legitimize a closure decision that has already been made. Smit (2001) concedes that policy-makers at national level usually produce policies and although teacher unions may represent them at policy level, schools and teachers remain in the background and their voices are seldom heard. A study of the *Challenges of Intensification of Saskatchewan Teachers' Professional Time* (SIDRU, 2013) concurs with this view as it states that senior administration and the Ministry make decisions that directly affect the work of teachers, yet with little opportunity for inclusion of and the input from teachers. Participants who took part in the study referred to above believed decisions are being made by individuals who have little or no classroom experience and are far removed from recognizing what is in the best interests of teachers and students in a classroom setting. This view is further echoed by Weber (2007) when he states that the teachers who are supposed to implement change in South African education reforms have been marginalized and alienated in different ways. Citing Torres (1996), Weber (2007) argues that the dominant approach is that teachers must adapt to the reform process, rather than the other way around. It is against this background that the problem statement below was formulated.

1.3 Statement of the problem

Despite this noble intention of the Department of Education to bring about change, rationalisation and redeployment has brought some challenges (Chudnovsky, 1998). My observation as a teacher is that rationalisation and redeployment in schools is inseparable from school closures as rationalisation may bring about closures which then lead to redeployment of the teaching corps of the affected schools. Rationalization and redeployment was introduced, yet no arrangements had been made for extra classrooms and teachers where needed. A critical shortage of teachers, books, chairs and classrooms are presently

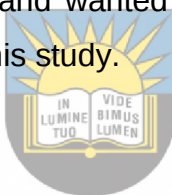
experienced by the schools that were rationalized. Some schools that have been affected have been left with three teachers from Grades 1 to 7 due to redeployment. A worrying fact is that there is no proper teaching as some teachers complained about high workloads and some resigned as a result of the policy. The former Member of the Executive Committee (MEC) in the Eastern Cape has stated that by the end of 2016, there were 219 one-teacher schools and one could not hope to have quality education under such conditions (Daily Dispatch, 2017). Such schools are good candidates for closure and teachers will have to move to where their services may be needed.

The above discourse concurs with Molale (2004) who stated that policy-makers and politicians are focused on the desired outcome of educational change but they neglect the contextual factors that influence implementation. This is further augmented by the research conducted in the Western Cape by Boughardt (2011), where teachers confirmed that the workloads of those who remain at school are increased by rightsizing. This means that the work of the person who has been redeployed has to be distributed amongst the remaining teachers on that post level at the school (Boughardt, 2011). Soudien (2001) concurs with this view and asserts that many teachers surveyed in the Western Cape perceived the introduction of rationalisation as just another burden they were forced to carry. Restructuring of these schools by no means automatically implied reform; on the contrary, it meant further hardship.

As a principal in one of the affected schools, the researcher has observed that this process has a negative impact for learners who have to walk long distances to and from schools, as no provision of scholar transport was made to the new schools. Distances between rural schools and places of residence form a significance barrier to physical access to education (KwaZulu-Natal, 2014). This view is affirmed by Mulkeen and Chen (2008) when stating that the distance to school is a major barrier to children's attendance. Mulkeen and Chen (2008) further claim that the school enrollment fell rapidly as the distance to schools increased. The researcher has observed as a teacher and principal of a school that learners who travel long distances on foot tend to fall by the way side as the year progresses. Furthermore, learners in some rationalized schools had to write the May/June examinations in 2014 without being taught in some subjects and learning areas while there is inadequate space for them to write their examinations.

According to Boughardt (2011) change associated with staff deployment can have a negative impact on the morale and motivation of teachers. Some teachers opted for resignation rather than being redeployed to other schools far from where they used to teach (Chisholm, 2005). The researcher's experience as a principal is that, amongst teachers who resigned due to the policy, are principals of schools who decided to leave the profession when their schools' post allocations declined. Xaba (2003) also noted that the movement of teachers during the academic year as a result of redeployment disrupts the quality of school cohesion and performance. Boughardt (2011) asserts that teachers opted for VSP as they saw it as a better option than being redeployed to schools far away from their homes.

Most recently, in 2015, when a teacher was redeployed from one of the schools around Alfred-Nzo West Education District, parents and learners caused unrest by locking gates, thereby denying anyone access into the school premises. Teachers who were not affected by redeployment did not feel secure and wanted to leave the school through transfers. This raised the research questions for this study.



1.4 RESEARCH QUESTIONS

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The study sought to answer the following research questions:

1.4.1 Main research question

What are educators and SGBs' perceptions on rationalisation and redeployment in schools?

1.4.2 Sub-research questions

To answer the main research question, the study was further guided by the following sub-questions:

- How do educators and schools benefit from rationalization and redeployment policy?
- What challenges do educators and SGBs encounter with the implementation of the policy on rationalization and redeployment in the selected school?
- What is the interface between instructional requirements and rationalization and redeployment?
- What are the implications for policy change?
- What framework can be suggested for policy change?

1.5 OBJECTIVES

The objectives of the study were to:

- Determine how schools and educators benefit from rationalization and redeployment.
- Explore the challenges that educators and SGBs encounter with the implementation of the policy on rationalization and redeployment in the selected schools.
- Determine the interface between instructional requirements and rationalization and redeployment.
- To determine the implications for policy change.
- To suggest a framework for policy change.

1.6 PURPOSE OF THE STUDY

The purpose of the study was to explore educators and school governing bodies' perceptions on rationalization and redeployment in schools in the Alfred-Nzo West Education District.

1.7 RATIONALE

The Alfred Nzo West Education District has a few Secondary Schools and many Junior Secondary Schools. Therefore, as a principal for the past 17 years, I was concerned about rationalisation and redeployment in schools, as it had led to the transfer of several learners from Grades 8 and 9 from the Junior Secondary Schools into Secondary Schools in the former Transkei homeland due to restructuring and rationalisation. This transfer also meant that enrollment in those schools declined. This decline in learner numbers resulted in the decline in the number of educator posts in those schools, hence redeployment. Educators feel threatened every end of the year when posts are to be declared by the Member of the Executive Committee (MEC).

Teaching and learning in schools that have been affected by rationalization and redeployment are adversely affected as the policy does not cater for subjects/learning areas offered at the school but the number of learners. The poor matric results in the Province of the Eastern Cape schools also show some glimpses of the instability in the educator component of various schools that had been doing well, as there is always an outcry about certain subjects having been without teachers for the better part of the year.

1.8 SIGNIFICANCE OF THE STUDY

The study might benefit schools that are affected by rationalization and redeployment as proper consultation arrangements might be put in place before the actual implementation. The Provincial Department of Education might benefit as the study might come up with alternative ways for the smooth implementation of rationalization and redeployment in schools. Learners might benefit and be saved from inconveniencies that they are faced with. The study might assist in proposing a framework that might assist the smooth and acceptable framework that may help ease the implementation of the rationalization and redeployment policy.

1.9 DELIMITATION OF THE STUDY

The study sought to explore the perceptions of educators and School Governing Bodies' perceptions on rationalisation and redeployment in all schools in the Alfred Nzo West Education District. However, it was limited to two High Schools in the Alfred-Nzo West District in the Province of the Eastern Cape.

1.10 DEFINITION OF TERMS

Educator: any person, excluding a person who is appointed to exclusively perform extracurricular duties, who teaches, educates or trains other persons or who provides professional educational services, including professional therapy and educational psychological services, at school (SASA, 1996). In this study this term was used to refer to school-based teachers including the principals of public schools.



Rationalization: this means the process of moving from a fragmented and dysfunctional system of administration to one which constitutes a balanced, integrated unity in which every component is essential for the effective functioning of the whole (Public Service Commission, 2005). In this study, it means the movement of teachers from one school to the other for operational purposes.

Re-alignment: this refers to the process of changing the way an organization works, by putting it in line with what is viewed as a normal system (ECDoE, 2007). In this study it was used to refer to the restructuring of the schooling system where Grades 8 and 9 (in the former Transkei region) were moved to secondary schools in order to have a uniform system of education throughout the country.

Redeployment: the transfer of educators from schools where there is an excess to schools where there is a shortage (Ramsay, 2006). In this study this term was used as defined.

Redundancy: a situation where dismissals are not related to conduct or capability of the individuals but as part of a restructuring where there is no reduction in the overall numbers employed because the employer has recruited new staff.

School Governing Body: a group of people elected for governance of schools in terms of Section 21 of the South African Schools Act. This comprises of parents of learners at school, teachers and learners from Grade 8 to the upper grades. In this study this term was used as defined.

1.11 CHAPTER OUTLINE



Chapter 1: This chapter gives a general overview of the study, introduction and background, problem statement, research questions, purpose and objectives of the study, significance, rationale, limitations and delimitations, and definition of key terms.

Chapter 2: This chapter presents the theoretical framework and related literature review on the rationalization and redeployment in schools.

Chapter 3: This chapter outlines the research methodology and design used in the study, the research paradigm, research approach, sample and sampling procedure, data collection instruments, data analysis and ethical considerations.

Chapter 4: This chapter comprises a detailed presentation, analysis and interpretation of data collected through semi-structured interviews and documents.

Chapter 5: Comprises a summary of research findings, discussion, recommendations and the conclusion of the study.

1.12 Summary

This chapter has covered aspects of the background to this study, statement of the problem, research questions, objectives, rationale, significance of the study, definition of key terms used in the study as well as the chapter outline for the entire study. In a nutshell, this represents an overview of the entire study. The theoretical framework and literature review will be discussed in the next chapter.



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CHAPTER TWO

THEORETICAL FRAMEWORK AND LITERATURE REVIEW

2.1 Introduction

This chapter presents a review of literature relevant to understanding the nature of the phenomenon investigated and what other researchers and commentators say about it. According to De Vos (2000), a literature review may have different purposes within either quantitative or qualitative research. Quoting Arkava and Lane (1983), De Vos (2000) mentions three functions of the literature study as:

- It may disclose that someone else has already performed essentially the same research. In such a case, the investigator may choose another problem and start afresh, or repeat the same research in a new setting. The new researcher can identify some deficiencies in previous research.
- It provides a substantially better insight into the dimensions and complexities of the problem. Because research is a source for building a knowledge base and learning about the previous thinking on the topic is an essential step.
- A literature review equips the investigator with a complete and thorough justification for the subsequent steps, as well as with a sense of the importance of the undertaking.

Maree (2011) echoes the forgone discourse by stating that literature normally provides an overview of current, and sometimes not so current yet still relevant and salient facets of the topic. He further goes on to say this assists the researcher to identify the gap between what has been written on the topic and what has not been written, as well as possible flaws in the literature (Maree, 2011).

This chapter will cover aspects of the theoretical framework, redeployment in schools, a snapshot of the global perspective of rationalization and redeployment in schools, the legal framework of rationalization and redeployment in South Africa, responses of teacher unions, the principle of fairness and justice, as well as the principle of equality, and the rationalization in the form of realignment and the merger and closure of schools as they relate to rationalization and redeployment of teachers.

2.2 THEORETICAL FRAMEWORK

This study was located within the Critical Social Sciences theory and the Complexity theories.

2.2.1 The critical social sciences theory



This study was guided by the critical social sciences theory, which has its origins in the Frankfurt School (Germany), where the Institute for Social Research was founded. This theory represents a different way of thinking, being primarily concerned with solving particular social problems. The idea of a critical sciences theory was developed by Habermas (1979) as a way of overcoming limitations. A critical social science theory is, for Habermas, a social process that combines the collaboration process of critique with the political determination to act and overcome contradictions in the rationality and justice of social actions and institutions. For the critical theory, the main interest of human beings would be to liberate themselves from forms of domination, which are best understood as what occurs when people's goals and means of achieving such goals are prescribed for them. This framework of thinking emanates from problems of everyday life, and is constructed with mechanisms of solving them.

In short, the empowerment and emancipation of humanity lies at the heart of the critical theory. The critical theory attempts to integrate theory and practice in that it sees theories as an analysis of a social situation in terms of those features, which can be altered in order

to eliminate certain frustrations which members in this model are experiencing (McLaughlin, 1999)

According to Du Preez & Roux (2008), critical theory provides guidelines that could direct the intervention research process towards becoming more participative and reflexive. The process of reflection should also be accompanied by participation that could lead to transformation. These authors concur with McLaughlin (1999) in that they say this theory has emancipation as its main purpose. The focus is on raising awareness, questioning and changing people's self-understanding and actions in order to free them from societal constraints, injustices and subjugations (Patton, 2002; Waghid, 2003). Waghid (2003) asserts that critical theory does not merely aim to explain the social world and people's understanding of it, but should lead to a critique of, and challenge the social world.

Critical theory is appropriate for this study as it concentrates on problems of everyday life such as the rationalization and redeployment in schools. Moreover, this theory aligns with this study as it was used to challenge and critique the redeployment and rationalisation process, and provide the kind of self-reflected understanding that permits participants to explain why rationalization and redeployment practices under which they operate are frustrating. This enables them to suggest the sort of action that is required if the sources of frustration are to be eliminated. The first function of critical theory is the formation and extension of critical theorems which can stand up to scientific discourse. Solutions to challenges experienced with rationalization and redeployment can, under such prepositions, only be carried out under conditions of freedom of discourse. Secondly, the organization of processes of enlightenment aim at giving participants an understanding of rationalization and redeployment and give everyone involved the opportunity to raise questions, affirm and deny validity claims and test their own point of view in self-reflective discussion on rationalization and redeployment. Based on this view, individuals will be freed from social processes that distort communication and understanding of practices associated with rationalization and redeployment, as they will be allowed to engage in the critical reconstruction of suppressed possibilities.

The critical social sciences theory as propounded by Habermas (1979) seeks to offer individuals an awareness of how their aims and purposes may have become distorted or

repressed and specify how these can be eradicated so that the rational pursuit of their goals can be undertaken. Seen in this light, critical social science will provide the kind of self-reflective understanding that will permit individuals to explain why conditions under which they operate are frustrating and will suggest the sort of action that is required if the sources of these frustrations are to be eliminated. Habermas (1979) also accepts that the source of subjective meanings lies outside the actions of individuals, hence the intensions of individuals may be socially constrained or redefined by external manipulative agencies.

According to Habermas (1979), this theory represents a method that will liberate individuals from the causal efficacy of those social processes that distort communication and understanding and, in doing, so allow them to engage in the critical reconstruction of the suppressed possibilities and desires for emancipation. Following Marx, Habermas argues that the method required for critical social science is that of *critique*. Marx (1967:137) had stated: "...we do not anticipate the world dogmatically, but rather wish to find the new world through criticism of the old; ...even through the construction of the future and its completion for all times is not our task, what we have to accomplish this time is all more clear: *relentless criticism of all existing conditions*". According to Marx (1967) it is this kind of criticism that might enable humanity to liberate itself from the dictates and compulsions of established ways of thinking and established forms of social life. Habermas (1979) argues that critique is required to give people a correct understanding of their situation which they have passively accepted under the sway of ideological systems of ideas that prevent them from recognizing and pursuing their common interest and goals. Thus, critique is aimed at revealing to individuals how their beliefs and attitudes may be ideological illusions that help to preserve a social order which is alien to their collective experiences and needs. Based on this view, an ideology is created and sustained through definite practices of work, communication, and decision-making.

The study employs the critical social sciences perspective particularly to criticise the redeployment and rationalisation process in schools by making teachers, school management teams (SMTs), and parents aware of the frustrating conditions and how these processes which they have passively accepted constrain and suppress their aims, beliefs and possibilities. Thus, there is a need to transform this ideology, which is characterized

by forms of communication which are not aimed at the achievement of mutual understanding and rational consensus among all stakeholders, and forms of decision-making which do not aim for social justice in which educators and parents participate democratically in making decisions that are affecting their lives and their futures. Seen in this light, the criteria of rationality (in communication), justice (in decision-making) and access to an interesting and satisfying life (in relation to work) provide benchmarks against which practices of communication, decision-making and work in relation to redeployment and rationalisation should be evaluated.

The redeployment and rationalisation policies by educational authorities are implemented at school level by changes in administrative procedures which are aimed at streamlining the education system. The critical social sciences theory thus emphasises the fact that practices associated with redeployment and rationalisation can be challenged and changed as they provide educators and parents with a platform to:

(1) identify those departmental and institutional patterns of practice that limit the achievement of more rational communication, more just decision-making and access to an interesting and satisfying life for all.

(2) decide freely on the basis of collaborative practical discourse what courses of action they should adopt in their attempts to change the existing conditions and policies. Under this pressure, the procedures associated with redeployment and rationalisation may be amended and new policies may come into being.

2.2.2 The complexity theory

Developed principally in the fields of physics, biology, chemistry and economics, complexity theory arises in some senses out of chaos theory in that it shares chaos theory's focus on the sensitivity of phenomena to the initial conditions that may result in unexpected and apparently random subsequent properties and behaviours (Mason, 2014). It offers insights into understanding change and implicitly, continuity. Chaos theory suggests that

even a very slight degree of uncertainty about initial conditions can grow inexorably and cause substantial fluctuations in the behaviour of a particular phenomenon. Complexity theory shares chaos theory's concern with wholes, with larger systems or environments and the relationships among their constituent elements or agents, as opposed to the often reductionist concerns of mainstream science with the ultimate particle (Mason, 2008). Complexity theory offers a lens through which a better understanding of what it takes to initiate and sustain a systemic change can be gained. This theory offers a dynamic and system-wide perspective on how sustainable change, characterized by new properties and behaviours in the education system, emerges from the interactions of a myriad of factors in the economic, political, social and cultural environment in which education is situated.

The central concern of complexity theory is on relationships among elements or agents that constitute a particular and sufficiently complex environment or system. A critical level of diversity and complexity must be reached for an education system to achieve sustainable autocatalytic in a particular direction. This theory posits that the phase transitions as the fundamental law of increasing complexity, but the specific details of this phase transition, i.e. when and how it occurs, what properties and behaviours emerge, are contingent on specific contextual factors and are probably unique to that particular context. Accordingly, complexity theory makes no claims of what is essential and what can be marginalized in search for the levels of history. It cautions against marginalizing or dispensing with what is apparently trivial or inexplicable. What appears to be marginal may be part of the complexity of a system, and may be a constituent of the critical level above which emergent properties and behaviours become possible. Mason (2008) further posits that, in the complexity of the educational environment, the plethora of relevant agencies and structures include teachers, students, parents and other community leaders, the state and its departments, economic structures and business organizations. Intervention to differing but sufficient extents in each of these areas would probably be necessary to shift prevailing issues in education. This means that change in education, at whatever level, is not much a consequence of effecting change in one particular factor or variable, no matter how powerful the influence of that factor (Mason, 2008). It is more a case of generating momentum in a new direction by attention to as many factors as possible. This is what the researcher supposes policy-makers in relation to rationalization and redeployment might

have missed out; to change or introduce a new policy in education requires intervention and consultation at every possible level, and so with rationalization and redeployment of teachers in schools.

Similarly, Amagoh (2008) posits that this theory focuses on how parts at the micro-level in a complex system affect emerging behaviours and the overall outcomes at the macro-level. Amagoh (2008) links the concept of 'entropy' with this theory, which refers to disorder, disorganization, lack of patterning or a random state in which there is no further potential for energy transformation or work. Based on this view, adaptation to the changing environment becomes more problematic, as it is with rationalization and redeployment in schools. Various scholars have written about complexity theory, including Ozer & Suker (2013). These scholars begin by defining complexity as "the property of real-world-systems that is manifested in the inability of any one formalism being adequate to capture all its properties" (Ozer & Suker, 2013 p. 92).

According to the authors, complexity theory argues that systems evolve with each other in a non-linear fashion and are subject to both positive and negative senses. This may better explain the situation in schools as there seems to be a mixed feeling and views around the rationalization and redeployment by different stakeholders, parents and educators in the context of this study. Some scholars argue that complexity theory has its roots in chaos theory, in which chaos is viewed as extremely complex information, rather than as an absence of order (Cairney, 2012). When redeployment and rationalization was first introduced in schools around the country, it was believed to have created disorder and chaos in schools by educators and parents. Schools and educators affected by the process of rationalization and redeployment found it difficult to adapt to changes brought by this change. Complexity systems tend to be deterministic in nature and evolve through a phase of instability. They differ from simple ones in having the capacity to create something new, i.e. new order and new structures; hence the policy has come up with new, uniform school prototypes that were different within the same country under the same ministry. Redeployment and rationalization in schools is also viewed as bringing disorder and a phase of instability in the affected schools as seen from the outside.

This theory is appropriate for this study as it is able to challenge the sustainability of rationalization and redeployment in schools, as educators and parents seem not to conceive the policy as intended. This implicitly means that there is a gap that needs to be filled between the policy intentions and its implementation practice.

This then led the researcher to venture into what is known in relation to the topic under investigation and how other countries deal with issues pertaining to human resources and change in their organisations.

2.2.3 Empirical studies

Rationalization and redeployment represent some of the reforms that have been the order of the day in education in various countries, more so in developing countries.

This part is divided into the following sub-sections:

- rationalization and redeployment in schools: a global perspective
- rationalization and redeployment in schools
- responses of teacher unions to rationalization and redeployment
- the principle of fairness and justice
- the principle of equality
- realignment of schools
- closures and mergers of schools

2.2.3.1 Rationalisation and redeployment in schools: A global perspective

A few countries' education systems were examined in order to get an insight into what is happening with regards to education policy and implementation, especially policies that relate to education reform.

In many parts of the world, especially in countries facing structural adjustment policies and cuts in education budget, planners and decision-makers are more interested in containing the investment in the teaching staff, particularly in optimizing the deployment and utilization of the available teaching force (Konadu, 2004). The concept, rationalisation and restructuring is not a new phenomenon as it has been taking place in education despite the fact that it had been taking place in different ways. South Africa, like other countries, had to embark on this exercise in the middle of the 1990s. The following countries' educational systems were examined in order to gain an insight in to educational reforms internationally and compared with the South African situation.

England and Wales

Relying on redundancy to achieve savings is a huge risk. This is especially true when such redundancies are as a result of change (Employment Protection: Policy and Procedure for Managing Change, 2010). In England and Wales, for instance, the Council and schools, through their governing bodies, were encouraged and advised about the need to look at a wide range of organizational and human resource policies to preserve and develop services and minimize loss of important skills and knowledge (Employment Protection: Policy and Procedure for Managing Change, 2010).

This is contrary to our situation in South Africa, where severance packages were offered for staff reduction (Chisholm, 2005); as well as the recent teacher resignations as observed by the researcher. The procedures developed in the two countries, England and Wales, had very sound reference points, viz; Employment Rights (1996); Schools Standards and Framework Act (1998); Employment Act (2008); The Amendment to the Staffing of Maintained Schools (Wales) Regulation (2004) and Equalities Act (2010). Reviewing staff levels requires considerably more than simply complying with the basics of statutory employment law (Employment Protection: Policy and Procedure for Managing Change, 2010). Every game is played according to its rules. The main principles behind the procedures for managing change were, but not limited to:

maintain a fair, transparent and consistent approach to identifying staff “at risk” of redundancy;

all staff are treated with respect, justice and fairness; and

- job security is maintained wherever practical.
- Schools through their Governing bodies were advised to try as far as possible to retain staff who were best able to meet the changing needs that will be placed upon them in the next few years (Employment Protection: Policy and Procedures for managing Change, 2010). The paper further suggests that it is vital that, when considering restructuring or reviewing staff levels, schools are able to meet the need to retain staff who:
- are most able to share best practice, raise standards, work together effectively and build communities of professional practice;
- have the best skills to ensure that children do not become disaffected, disengaged or excluded; and
- are able to demonstrate that they are best motivated and can work with other colleagues to ensure that children are kept safe.



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When scrutinizing the two policies, Rationalization and Redeployment in South Africa and The Employment Protection: Policy and Procedures for Managing Change (2010), the former is not directly controlled by the SGBs, but their responsibility is to sign for an educator leaving the institution and are never engaged in any meeting dealing with identification of excess educators. On the contrary, with the latter, the SGBs are hands on as it is explicit that they are fully involved in the staff review process together with other stakeholders. The other thing that is good about the latter policy is that its principles allow for flexibility of retaining staff to meet the challenging needs in the next few years, whereas in the South African context there is no such arrangement; instead, a teacher may be retained only if he/she is due to retire in the next six months (ELRC Resolution no 1, 1996).

Australia

Griggs and Hyland (2002) argue that downsizing is a way of life in organizations today. They further argue that in Australia, like any developed country, such initiatives are often taking place within large organizations that had in the past enjoyed a degree of immunity from retrenchment. This fits in well with the principles of rationalisation and redeployment, as there would be no retrenchments on the side of teachers declared additional to their institutions (Resolution 3 of 1993, RSA). Griggs and Hyland (2002) affirm that since the mid-1980s, employment downsizing has been regarded as the preferred route to improving organizational performance. These authors, citing, *Serving the American Public: Best Practices in Downsizing* (1997), further state that the success or failure of a downsized organization depends on the workforce remaining after downsizing. With regards to rationalization and redeployment of teachers, this means that the number of teachers that remain after redeployment would determine the success or failure of those schools to accomplish the vision of the Department of Basic Education, “i.e. for quality education”. Development of policy framework in all governments globally is the competency of government decision-makers (Kaplow and Shavell, 2001). According to Kaplow and Shavell (2001), research indicates that economists evaluate policies with reference to individualist notions of welfare, under which assessment of policies depends exclusively on their effect on individuals’ utilities. Kaplow and Shavell (2001) state that such an approach may be contrasted to that of many citizens and government decision-makers. They continue to say that government decision-makers and many citizens tend to think that individuals’ utilities are not the only relevant considerations in determining which policies the society ought to adopt; they often regard other principles as important in their own right. Many countries throughout the world have at one stage or another worked on developing their different education frameworks as is the case with Armenia below.

Armenia

Like former socialist countries in Central and Eastern Europe and Central Asia, Armenia underwent a profound transition since the start of political, economic and social reforms in

the early 1990s (Kuddo, 2009). In the 1990s, there was a rapid decline in the school-age-cohort due to demographic change caused by, among other things, low fertility rate and emigration. It is the researcher's observation that low fertility and emigration, in particular, contribute much to the decline in pupil enrolment in schools as parents move with their families to well-serviced areas like urban areas, hence redeployment of teachers from rural areas. The government of Armenia began implementing structural reforms in general education in 1998 (Kuddo, 2009). Kuddo (2009) further posits that these reforms among other goals were aimed at promoting more efficient public funding and reforming financing and management of educational institutions.

According to Kuddo (2009) the reforms went through a highly political and social process, and the risk of failure or success had more to do with politics and policy formulation than with the technical questions of implementation. On the other hand, a key obstacle in the reform agenda was very low and weakening pupil-teacher-ratios inherited from the Soviet times (Kuddo, 2009). It is unlike the South African context where the democratic government had inherited a system of education where the pupil-teacher ratio was biased towards the former white-only-schools, with very low pupil-teacher-ratios as compared to the black-only-schools. The government of Armenia addressed the issue in 2003 by closing 37 schools which led to approximately 2000 teachers being declared redundant rather than surplus to the number of teaching posts. This was the beginning of a painful process (Kuddo, 2009). Class size norms and workload of teachers as well as curriculum changes are some of the measures that were implemented to reduce demand for teachers in schools (Kuddo, 2009).

Kuddo (2009) avers that redundancies affected the livelihood of thousands of households in a situation where unemployment was already very high. Unlike in the South African context, redundancy meant retrenchments in Armenia, as teachers who were identified as redundant were subsequently retrenched. The author further states that almost 70% of the teachers had been working in the same school during their entire career, so a teaching job was for most of them the only one for which they were qualified. At the early stages of reforms, there were mandatory benefits that were provided to redundant teachers by the government. These included, *inter alia*, severance payments, unemployment benefits and

access to very limited active labour market programmes (Kuddo, 2009). The survey conducted by the government of Armenia about redundant teachers revealed that about two-thirds of redundant teachers with pedagogical background had no desire to work in any field other than teaching (Kuddo, 2009). The report further reveals that very few teachers were willing to step down to positions lower than the ones they held before or to accept jobs for which they were over-qualified as there were no alternative jobs available. As the last resort, a programme for possible relocation was instituted with the aim of raising the chances for successful acquisition of a new job for redundant teachers. Provision of relocation services and grants reimbursed for the costs of the relocation expenses, including travel expenses for the family as well as of personal belongings per family, were introduced. In December 2006 this arrangement was amended to restrict the list of teacher vacancies, and entitlement to a relocation grant was limited only to those relocating to high mountainous and boarder settlements (Kuddo, 2009).

This brings forth another aspect, 'relocation', as relocation can have serious repercussions for both the employer and the employee. Employees can suffer from mental and health problems that may not only affect their jobs, but also bear upon their positions within the organization that employ them, schools in this study. Self-esteem and family relationships are placed at risk (Sharp-Paul, 2000). The researcher's position on this issue is that relocation can be frustrating and stressful as one has to adapt to the new environment and new colleagues with different cultures, beliefs and values. Such cultures, beliefs and values may be different to those that relocating personnel may be used to. Rationalization and redeployment also subject teachers to relocation, taking them away from their families.

Finland

According to Autti and Hyry-Beihammer (2014) the essential goal of the Finnish basic education is to provide all citizens with equal opportunities for education regardless of geographic residence or socio-economic background. These researchers further state that rural schools have been pivotal in ensuring that such goals are accomplished; they have been the heart of their villages' social life. Like in most countries, many rural schools have

been closed and these closures are often explained in economic terms. These schools are said to be too expensive to operate and it is cost effective to transport children to bigger schools (Autti and Hyry-Beihammer, 2014). The researcher opines that rural infrastructure needs to be revisited as it may not always be the only solution; other avenues need to be exploited other than transporting learners to bigger schools. Most rural roads are not always in good condition, which might lead to learners not getting to school on some days.

The Finnish national education's administration is organized at two levels (Autti and Hyry-Beihammer, 2014). The Ministry of Education and Culture is responsible for education policy whilst the Finnish National Board of Education is responsible for implementing the Ministry's policy aims: developing education, enhancing its effectiveness, and monitoring education provision. These researchers further state that basic education in Finland is composed of nine years of mandatory comprehensive school preceded by one year of optional pre-primary education (Autti and Hyry-Beihammer, 2014). The first six years of basic education, Grades 1 to 6, are called primary education, and the last three years of basic education, Grades 7 to 9, are called lower secondary education.

Just like in many countries, the Finnish small schools are located in the rural areas and enroll children of 7 to 12 years of age in Grades 1 to 6 (Autti and Hyry-Beihammer, 2014). Rural schools are said to have had an important role in Finnish education. The 1898 district division decree proclaimed a goal of a school in every village (Autti and Hyry-Beihammer, 2014). According to the decree, provinces were to divide regions into school districts so that no student had to travel more than 5 km to attend school. This led to the increase in the number of schools in Finland as every village had its own school (Autti and Hyry-Beihammer, 2014). This is similar to what happened in the former Transkei region in the Eastern Cape Province of South Africa under the then Homeland Department of Education during the late 1980s. Implicitly, if every village owns a school, the number of learners per school may not grow in line with the increase in the number of schools. The same happened in Finland; hence closure of small schools as is the case in the Eastern Cape Province of South Africa. According to these researchers, in such schools, due to low enrollment, two to three teachers teach different grades in the same classroom, the so-called, multi-grade or multi-age teaching. In view of this, large powerfully resourced, single

grade schools were favoured and the goal was to transport children from village schools to these big schools (Autti and Hyry-Beihammer, 2014).

The early 1990s witnessed the collapse of the Eastern European economies, which contributed to a severe recession in many countries in Western Europe. Finland's depression in the early 1990s was caused by the collapse of its trading partner, the Soviet Union, and the sharp rise in European interest rates, the drop in its Growth Domestic Products (GDP) coupled with a rise in unemployment rate, (Honkapohja and Koskela, 2001, in Autti and Hyry-Beihammer 2014). During this period, a new wave of school closures began as part of a strict municipal saving policy. School closures have been mostly explained and justified along economic lines ever since.

According to Autti and Hyry-Beihammer (2014), more decision-making power was transferred to municipalities. These researchers contend that the end of additional funding of small schools by the state in 2006 led to municipalities closing small, local schools to solve financial problems. The 2007 Official Statistics of Finland indicate that in 2006 a record of 186 schools had been closed (Autti and Hyry-Beihammer, 2014). From 1990 to 2010 (Autti and Hyry-Beihammer, 2014) many comprehensive schools closed in Finland. The number of school closures has remained high since 1992 and most of these closures were in the rural areas. Although schools had been closed in the outlying regions, new schools were built in population centers. Previous studies conducted on proposed school closures in New Zealand indicated that neither the centrality of the school nor the consequence of a school closure on communal well-being are considered when a school closure is threatened (Autti and Hyry-Beihammer, 2014).

A legislative change ratified in the beginning of 2010 led to an increase in independent municipal decision making about education. Initially, the state had allocated separate compensation for the up-keep of small schools, but the funding provided by the state was no longer earmarked. The state pays for operating costs resulting from organizing educational services according to a legally defined basis for a calculation (Autti and Hyry-Beihammer, 2014). If a municipality organizes elementary education services more cheaply than the base unit price (Autti and Hyry-Beihammer, 2014), the state funding that the municipality receives, does not decrease; however, if the educational costs exceed the

level designated by the base unit price, the municipality must cover all extra costs. Research indicates that in the current situation of extended worldwide stagnation, closing of a small school and centralizing students in larger units may be justified as a significant money-saving opportunity (Autti and Hyry-Beihammer, 2014). This might be true as closure and merging of small schools may lead to a high number of teachers teaching an acceptable number of learners and the government maintaining schools that are viable.

Ontario

Ontario is Canada's largest and most diverse province serving just under two million children in four different publicly funded school systems (English public, English Catholic, French public and French Catholic). Ontario Ministry of Education developed guidelines for school closures to be followed by school boards (Fredua-Kwarteng, 2005). These guidelines were structured in such a way that they allowed the school boards the latitude to manage the closure process, which then made it possible for the Ontario government to regulate education to suit its political agenda. According to Fredua-Kwarteng (2005), school boards close down schools permanently for reasons such as inadequate funding, escalating operational costs, dwindling enrolment rates or uninhabitable buildings. The principle of procedural fairness and the Ministry of Education regulations had to be complied with for School Boards to go ahead with closures (Fredua-Kwarteng, 2005). In most cases, the affected communities do not stand aloof when school boards close their schools. Most communities normally mount legal battles and political resistance to challenge closure decisions. Communities perceive schools as belonging to them (Fredua-Kwarteng, 2005). Communities as the real owners of schools felt that it was management (school boards) that had to listen them rather than the vice-versa. The ministry of education required every school board in Ontario to submit a definite procedure for community involvement, the effects of the closure on the school area, and a minimum of 18 months' notice from the time of the board's decision to close the school (Fredua-Kwarteng, 2005). Educators on the other hand have an employment contract with government, so it means that they may not just be thrown out of the system but redeployed to where there is a significant number of learners to teach.

Several regulations were proclaimed by the government in order to ameliorate the relationship between the school boards and the affected communities. One of the stipulations of the policy regulation proclaimed in 2005 was that school boards develop their own school valuation tool to weigh four sets of considerations about a school marked for closure (Fredua-Kwarteng, 2005). These were the schools'

- value to the students,
- value to the community,
- value to the school system, and
- value to the local economy.

As much as the regulation required boards to conduct an investigation on the importance of the school to the local economy, school boards were not required to evaluate the financial implications of closure such as the provision of transport, operating costs of the receiving school, and what to be done with closed school buildings (Fredua-Kwarteng, 2005). Referring to a study conducted by Lyson on schools in rural areas in 2003, the researcher (Lyson, 2003) found that those rural areas with schools had higher real estate value, well developed municipal infrastructures, higher employment rates, a more economically independent middle-class and a lower rate of welfare dependence (Fredua-Kwarteng, 2005). This study further concluded that when a school closes in a community, it contributes to the economic decline of the community (Fredua-Kwarteng, 2005). The idea is refuted by Dean (1983) in Fredua-Kwarteng (2005) when arguing that it may not be possible to show that a school closure decision will have or have had negative consequence on the community. Dean (1983) argues that it would be very difficult, if not impossible, to show that school closure itself is the cause and not the effect of community or neighbourhood decline (Fredua-Kwarteng, 2005). However, a school may close due to a decline in the community, declining school enrolment because of low birth rates or closing down of a manufacturing plant that devastated the economic base of the community (Fredua-Kwarteng, 2005).

Guinea

The structure of the Guinean pre-university education system since the 1984 reform had been similar to that of other French-speaking countries (Conde, 1995) comprising of three levels:

- Primary school: children enter primary school at the age of 6-7 years or more. Primary education covered six grades at the end of which learners sit for a secondary entrance examination. Each teacher was responsible for a group or class of pupils.
- General secondary school: This level lasts 7 years and was divided into junior secondary, taking learners who have passed the secondary school entrance examination to begin their 7th Grade. Four years later, learners sit for a certificate that entitled them to upper secondary entrance (Conde, 1995) at the end of which (3 years later) they sit for the final school leaving certificate, *Baccalaureate*.
- Technical and vocational education: This was provided in two types of schools: (a) entrance to vocational schools is by competitive examination by junior secondary school leavers and lasts for two to three years at the end of which a certificate of completion or technical skill was awarded; (b) national vocational training school to which entrance was by competitive examination among holders of Baccalaureate or equivalent qualification (Conde, 1995) and also for a duration of two to three years, depending on specialization.

Until 1990 Guinea was among ten countries having the weakest education system, where the literacy rate was less than 30%. There were 432 749 pupils enrolled in primary secondary schools and in technical and vocational schools. There were 17 945 teachers and 60% of them worked in urban areas and 40% in rural areas (Conde, 1995). Conde (1995) contends that 80% of the population in Guinea lived in rural areas. During the years 1992-1993, there had to be some major reforms in the education system (Conde, 1995). The author states that constraints placed on the education system by macro-economic structural adjustments were part of the adjustments, investments and financial equilibrium.

According to the author, the first phase of structural adjustment programme (SAP) of 1985-1988, called Economic and Financial Reform Programme (EFRP), involved the reform of the Civil Service (Conde, 1995). When the programme was carried out as a testing programme under this reform, it reduced the number of civil servants by 40% (Conde, 1995). This excluded the health sector and the educational personnel. The education sector was exempted because of the educational needs of the country. Conde (1995) avers that three measures covering the entire education sector were proclaimed. The first was the rational allocation of personnel to meet the staffing requirements based on the development of social construction and the social demand for education. The second measure was to call for a halt to all recruitment in the education sector which had exceeded the ceiling laid down for the Civil Service as a whole (Conde, 1995). The last measure was the adoption of a policy of in-service training designed to improve the quality of education. For the purpose of this study, the last measure has been left out.

Conde (1995) further states that one of the commitments entered by the Government in negotiating ESAP with its financial partners was the adoption of a coherent and coordinated strategy of redeployment, training and recruitment of teachers over the 1990-1993 period. The introduction of multi-grade classes in rural areas and organizing double-shift classes in urban areas was seen to be an essential condition to raise the pupil; teacher ratio, which would also lead to an increased number of primary school pupils in satisfactory teaching conditions. Rational and efficient use had to be made of available human resources and redeployment of teachers was seen to be one of the best strategies to achieve this. The redeployment of personnel had become a categorical imperative for the Guinea's education system, one of the main causes of the malfunctioning being the unorganized human resources and under-employment of personnel (Conde, 1995). The aim was to remedy the imbalances resulting from the inefficient distribution of teaching staff in schools, subjects and levels of education. The author further posits that teachers had been posted in accordance with their preferences, irrespective of educational requirements. There had been an exodus of best primary school teachers to secondary schools, as opposed to what is being experienced South Africa where primary school teachers shun teaching at secondary schools. This weakened the primary schools and overstaffed the secondary

schools (Conde, 1995). Conde (1995) further posits that the pupil-teacher ratio varied from 60:1 in urban schools and 37:1 in rural schools. The pupil-teacher ratio in secondary schools was oscillating around 19 which was way below the Declaration of Education Policy approved by the Government in 1989 which aimed at increasing the pupil-teacher ratio from 39 to 42 as one of its objectives to make more efficient use of teachers. Similarly, teachers prefer teaching in the most accessible areas and shun teaching in deep, remote rural schools (Mgojo, 2013), thus semi-rural and urban as well as town schools had more teachers and resources than deep, remote rural schools. Some teachers ended up deemed redundant due to skewed distribution of teachers, and the need for rationalization and redeployment was glaring.

Geographic redeployment shifted teachers across the country in an effort to iron out variations in pupil-teacher ratios (Conde, 1995). According to Luschei and Chudgar (2015) Guinea's redeployment effort facilitated equitable teacher distribution, providing an example of equity-enhancing teacher redeployment. In Guinea, the initiative to redistribute existing teachers was complemented by the hiring of contract teachers leading to hybridization of the teacher workforce in 1998, called position-based teaching as opposed to career-based teaching where teachers are part of a professional teaching force for the rest of their careers (Luschei and Chudgar, 2015). Luschei and Chudgar further posit that contract teaching was adopted in a number of countries, such as India, Cambodia and Nicaragua. Contract teachers had less job security and earned lower salaries compared to the regular civil service teacher labour force (Luschei and Chudgar, 2015).

Chudgar (2015) avers that contract teaching in Guinea is unique in ensuring attention towards equity and even quality while being driven by cost-efficiency constraints. According to Chudgar (2015), contract teachers in Guinea receive high levels of support and access to continuing educational opportunities and were significantly more educated than regular teachers. Some countries, South Africa in particular, were soon to follow the same practice, rationalization and redeployment.

Uganda

Uganda's education policies stem from the Government White Paper on Education (1992) and Educator Sector Strategic Planning (2004). The White Paper on Education is seen as the foundation of the country's structure, policy and programming in education (Ministry of Education and Sport, 2013). The Education Sector Strategic Planning (ESSP) was revised in 2007, a decision to re-cost and update the strategic plan was propelled by the addition of six objectives to Uganda's policy agenda; bringing the ESSP into full conformance with EFA FTI goals (the ESSP 2004-2015 which had been designed to fit within the financial constraints):-

- Improving the quality of education in primary schools
- Ensuring that all pupils who successfully completing Primary 7 have access to secondary education or BTVET
- Strengthening science and technology by providing science laboratories and well-stocked libraries to secondary schools
- Increasing participation in tertiary education so as to ensure that Uganda meets its high-level work force.
- Increasing the attractiveness of the teaching profession (Ministry of Education and Sport, 2013).

Uganda's structure of formal education was inherited from the colonial government (MoE &S, 2013). It provides for four levels of education, viz:-

- Non-compulsory pre-primary phase for early childhood development
- 7 years of primary education for 6-12-year-olds
- 4 years of lower secondary education for 13-16-year-olds
- 2 years of advanced secondary education and
- Tertiary and university education

At primary level, teachers are recruited after the head-teachers have identified vacancies using the recommended staff establishment formula. This formula is implemented in two phases (Ministry of Education and Sport, 2013). The report further states that the school

must make sure that each class or stream has a teacher. A class without a teacher identifies a vacancy. The second step is to consider the enrolment. Where the pupil: teacher ratio (PTR) is greater than 53, which is the national PTR, any addition over 53 pupils attracts an extra teacher (MoE & S, 2013).

After the head teacher has identified the number of vacancies, the number is sent to the District Education Office (DEO). The DEO then compiles the total number of vacancies in its district and sends it to the Chief Administrative Office (CAO). The CAO sends the need to the Central Government for clearance which then compiles the total number of teacher needs in the country and liaises with the MoEFPDE to ascertain the availability of funds for paying teachers. However, the amount of resources available at the MoEFPDE determines the number of teachers that can be recruited at national level. The number is generally lower than the total number of identified vacancies (MoE & S, 2013). It is the office of the Permanent Secretary of MoES's responsibility to decide how many teachers each district is allowed to recruit. The decision of the Permanent Secretary (PS) is based on the idea to reduce disparities between the districts' PTRs (MoE & S, 2013).

Using EMIS data for each district, the PS's office compares the number of teachers in each school and identifies where there is surplus of teachers for redeployment in schools of the same district (MoE & S, 2013) to where there is shortage of teachers. This reduces the number of vacancies initially identified. Once this has been done for all districts (MoE & S, 2013), a new series of real vacancies per district is derived. The total number of teachers to be recruited per available funds is allocated to districts according to the real need for teachers. The Permanent Secretary then informs the CAO on the number of teachers to be recruited by each district. The researcher is of the opinion that this is done at primary schools in order to lay a solid foundation for a resounding education.

At secondary school, the staffing gaps at school are identified by the head-teacher as in the primary school, but this is done based on the recommended teaching load and the subjects offered by the school (MoE & S, 2013). For a given subject, the head-teacher compares the total number of hours and divides them by the number of teachers who offer the subject. The remaining periods determine the need. This is then submitted to the commissioner of secondary schools. All needs are aggregated, by subject, at national level

and the budget allocation implication is provided to the Permanent Secretary of MoES. The same procedure followed in the primary schools, wherein the Permanent Secretary writes to the MoEFPDE for budget allocation depending on the number of teachers to be recruited and gives feedback (MoE & S, 2013). Then schools are given posts as per needs.

Ghana

Before 1974, the Ghanaian Ministry of Education was the sole organ responsible for the formal education in the public sector (Konadu, 1994). Since 1974 (Konadu, 2009), there have been two distinct bodies responsible for education delivery at pre-tertiary level: The Ministry of Education which was responsible for policy formulation, planning, monitoring and evaluation in education matters, and the Ghana Education Service (GES); responsible for the implementation of national policies on education at the pre-tertiary level. There had been two parallel management organs within the public education system. According to Konadu (1994), schools were managed by GES either directly through the District Education Offices or indirectly; through the Church Education Unit which operates at regional level as sub-sets of the GES (church managed schools), which enjoyed the same status and operated under the same regulations as schools directly under the GES (Konadu, 1994).

In 1987, the education system, as stated by Konadu (2004), consisted of a 17-year pre-tertiary education made up of six years primary, four years middle and 5 + 2 years of secondary education, followed by a three to four-year university course. This arrangement/structure was changed to a 6+3+3 structure as part of major reforms by the government. Konadu (1994) posits that the main objectives of this structural reform were to:

- Improve pedagogic effectiveness and raise the quality and relevance of education outcomes;

- Reduce the duration of pre-university education from 17 to 12 years so that savings made could be ploughed back to expand access to education, particularly at basic and secondary;
- Improve management and budgetary procedures within the Ministry of Education; and
- Make education cost effective through cost sharing and elimination of wastage from the system.

In 1992, Konadu (1994) states that the GES decided to streamline the staffing of education offices and get all excess trained teachers working in education offices sent back to the classroom. According to the new District Education Office Organization Chart, the staff establishment for the district education was fixed at fifty (50). There would be 21 non-teaching personnel and 29 professional teachers. Data gathered after the implementation of this reform indicates that the reform had improved the staffing situation in schools (Konadu, 1994). According to the author, redeployment in Ghana was not without challenges as:

- Teachers secured medical certificates stating that they suffer from chronic ailments and he/she has to be near his/her doctor who usually practices in an urban centre;
- Female teachers, through securing marriage certificates entitled them to be posted where their husbands live;
- Patronage and influence (Konadu, 1994).

Through the school mapping and locations exercise in 1996, the Ghanaian Ministry of Education was able to identify:

- those over-staffed schools whose excess teachers should be posted to needy schools;
 - under-enrolled Junior Secondary Schools (JSS) which could be merged into viable JSS without children having to travel more than five kilometers to attend school.
- This resulted in the closing down of over ninety (90) middle schools with teachers re-posted to needy schools.

The change in the structure of education involved a gradual phasing out of the four-year middle school and replacing it with a three-year Junior Secondary School with an entirely

new curriculum which was less theoretical and more relevant to the socio-economic needs of the country. The old five (5) plus two (2) secondary programme was replaced by a three-year Senior Secondary School offering a curriculum with a more practical base (Konadu, 1994).

2.2.3.2 Rationalization and redeployment in schools: The South African perspective

If the Schools Act sought to extend democracy within the education system and give teachers a voice in school governance, the manner in which the state embarked on the rationalization and redeployment of teachers did not (Weber, 2007). Weber (2007) argues that a top-down policy was enforced, despite opposition and protests from local communities. The researcher agrees with the foregone contention as the policy was contested in court by Grove Primary School and eighty other schools. This shows that the community of those schools was not content with the manner in which the policy was introduced by education authorities. According to Weber (2007), in 1996 the government attempted to implement two policy goals, viz: the realization of a more equitable distribution of teacher resources nationally to redress the inherited racial and provincial inequalities, and the reduction of education spending by voluntarily implementing a structural adjustment programme. Research points out that reducing the financial support for social services, including public education, has occurred worldwide, with devastating consequences, especially in Africa (Weber, 2007). This researcher confirms that the South African government admitted that neither of the set goals was achieved and cost cutting in education became more popular than achieving equity (Weber, 2007).

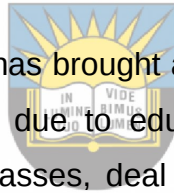
Despite the information above, the DoE in consultation with educator unions initiated the policy of teacher rationalization and redeployment when the country gave birth to a new non-racial democracy in 1994. This was in response to addressing the inequalities in education created by apartheid (Bharath, 2004). Bharath further contends that, in education, new policy directives were initiated as part of a transformation process. Transformation in education was to be brought about through rationalization and

redistribution of educators to ensure equity and redress of human resources. Policy-makers also felt that rationalization and redeployment would be an economic way of providing qualified educators to poorly staffed black schools, more so in rural and disadvantaged areas, without having to increase the salary budget. A very close look at this affirmation will indicate that schools that are severely affected by rationalization and redeployment of the teaching corps are mostly in the rural and disadvantaged areas, as there is an exodus of people from rural areas to urban or semi-urban areas (Bharath, 2004). This means that employing more teachers would mean more costs incurred by the state. The same may be said of urban and semi-urban schools which may be over-staffed whilst there is a huge shortage in the rural schools. Thedi (2004) posits that the first step of the rationalization process was to provincialize education and it was aimed at attaining equity of education at a provincial level. It was proposed that some provinces would lose teachers while other provinces would gain teachers. Teachers declared in excess in one school were to be redeployed to a school where they would be needed (Thedi, 2004).

In 1995 and 1996 the government and teacher formations negotiated an agreement which, it was hoped, would lead to an orderly rationalisation and redeployment of the teaching force based on the commitments that had been made, the needs of students, and the input of teacher organizations (Chudnovysk, 1998). Chisholm (2005) states that in 1996 the DoE introduced the policy based on resolution 3 of the Education Labour Relations Council (ELRC) which sought to reduce the learner to teacher ratio: 40:1 in all primary schools and 35:1 in all secondary schools. However, in line with the government policy on the rationalisation and redeployment of teachers, there were to be no retrenchments or forced retirements. Teachers in the better-resourced parts of the system did not move to the poorer-resourced parts of the system. Instead, poorer provinces employed new teachers, many of whom were poorly-qualified (Chisholm, 2005). This is further corroborated by Anzia and Moe (2014) when they state that research has shown that, when changing schools, teachers are likely to move from disadvantaged schools into those that are more advantaged.

When posts are declared at the end of September every year, they are based on the current years' statistics and no projection for the following year is ever made. Schools that have

been realigned in the former Transkei homeland, as stated in the introduction and background, and growing incrementally, that is, addition of one grade a year, when post establishment is declared, the declaration does not consider such an increase in grades, and, as a result, children end up without teachers for the better part of the year (Kota, 2013). This appears to be a contradiction of what Chudnovysk (1998) states when asserting that the policy was based on commitments made on the needs of students. It is also confirmed by Chisholm (2005) that poorer provinces employed even the poorly-qualified teachers. The researcher believes that all students need better-qualified teachers in order to do well in their studies. Parents then take their children to schools where there are no staffing problems and thereby exacerbating redeployment of some more educators. This still needs to be addressed as education has been dubbed a “societal issue”. If learners are taught by poorly-qualified or inexperienced teachers, there is a dire need to reflect on the ruling party’s election manifestos of previous elections.



Redeployment and rationalization has brought about serious challenges in most schools. Bharath (2004) accentuates that, due to educators being redeployed, the remaining educators have to teach larger classes, deal with tightly packed timetables and carry increased workloads. The remaining educators have to teach subjects with which they have little or no experience. Moreover, to ensure that there is an educator in front of every class, classes are combined (Bharath, 2004). The researcher avers the MEC’s statement that in such cases proper teaching and learning may hardly be realized (Daily Dispatch, 2017). The study conducted by Douglas (2005) concurs with Bharath (2004) by stating that one farm school with three teachers lost one to redeployment, reducing the staff to two, necessitating classes of multiple grades. Douglas (2005) further posits that a brand-new school was completely staffed by redeployed teachers from other schools, and a year later four of them were redeployed. Reports from principals who were participants in the study suggested a further deterioration of school morale from a set of teachers declared “in excess” (Bharath, 2004). Furthermore, a study indicates that in ten schools, rationalization and redeployment had caused a serious lowering of morale because of extra pressure placed on the remaining teachers (Douglas, 2005). This is further asserted by Sikes (1992) in Lindley (2013) when contending that low morale, dissatisfaction and reduced

commitment are the end result of imposed change. Lindley (2013) notes that in schools that lost teachers, a pattern developed of learners being sent to schools with better staffing ratios. This meant that a new set of teachers had to be declared in excess and redeployed. Having laboured on the above input by these researchers, the researcher feels that the manner in which rationalization and redeployment of teachers was and is implemented needs to be reviewed in order to stabilize the main purpose of having schools, teaching and learning.

A study conducted by Sharp-Paul (2000) is indicative of difficulties in adjusting in the new work environment. The author claims that an individual's degree of successful adjustment is closely related to his/her past experiences, environmental influences and personal strengths (Sharp-Paul, 2000). Adjustment problems are not a new phenomenon; human beings are constantly adjusting their behaviours according to standards laid down by the society or the community. Poor work adjustment gives rise to worker inefficiency, discontent, and resentment, feelings of frustration or seriously maladjusted behaviour (Sharp-Paul, 2000). The researcher's experience as a teacher is that teachers spend most of their time at schools, and for them to be productive in their area of operation there is a dire need for them to be satisfied with the work environment, lest they may end up getting frustrated and perform below average.

Teacher rationalization and redeployment relates to the transfer of teachers from one school to the other. The culture of schools varies from school to school and this can impact upon the beliefs, values and attitudes of teachers and lead to a type of 'culture shock' (Wallace and Tickle, 1983, in Lindley, 2013). This can lead to a match or mismatch between the cultural aspects of a school and the values, attitudes and beliefs of individual teachers (Lindley, 2013). Citing Puusa et al. (2013); Day et al. (2007); Sikes (1992) and Fullan (1991), Lindley (2013) expounds that there are difficulties with changing cultures as is the case with redeployment, because the values and beliefs are intrinsically tied up to where teachers choose to teach (Lindley, 2013). Teachers' perception of experiencing changes in school culture can differ and contextual factors can influence them and their practice (Lindley, 2013).

In this study, the researcher wanted to explore the perceptions of educators and School Governing Bodies on rationalization and redeployment in their schools and the interface between rationalization and redeployment and teaching and learning in schools. The researcher felt it necessary to build on what other researchers and or literature say about education transformation in other countries or continents. The following section is intended to shed light about this aspect.

2.3 LEGAL FRAMEWORK FOR RATIONALISATION AND REDEPLOYMENT IN SOUTH AFRICA

The rationalization and redeployment policy in South Africa is hinged on a number of policies that were introduced to address the apartheid imbalances of the past in education. These include, amongst others, the Supreme Law of the Country, the Constitution of the Republic of South Africa, Act 108 of 1996; the South African Schools Act, 84 of 1996; National Education Policy Act, 27 of 1997; Employment of Educators Act, 76 of 1998; Education Laws Amendment Act of 1997 as well as the resolutions that were made in the ELRC by the employer, the Department of Education, and teacher unions that are part of the bargaining chamber. A few resolutions which form the legal framework were looked into and the contents of such are presented and interrogated for the purpose of this study.

2.3.1 The Constitution of the Republic of South Africa, Act 108 of 1996

According to Section 29 of the Constitution, all children have a right to basic education irrespective of their geographical location. Implicitly, this means that a child has this right; whether he/she is in an area that is considered to be inaccessible by other people, that right still prevails. The policy on rationalization and redeployment is not in conflict with the Constitution as it is aimed at the redistribution of resources, more so, human resource. Section 28 also entrenches the right to proper education and provides specific protection for children. It reads thus, '*A child's best interests are of paramount importance in every*

manner concerning the child.' Children in rural and township schools are entitled to suitably qualified teachers in order for the children's right to be upheld. It is the researcher's opinion that this could be the only way to affirm this constitutional right by the ANC government.

2.3.2 The South African Schools Act, 84 of 1996

Section 2 of the Act, sub-section 33, is clear, saying that the Minister of Education determines the norms in respect of posts to be allocated to public schools, in relation to their curriculum and other circumstances, which the Head of Department must follow in distributing the available posts within the approved education establishment of a Provincial Education Department (PED). The number of teacher posts allocated is determined according to a formula that weighs certain specific factors, such as class size, the range of subjects a school offers and the poverty level of the particular community in which a school is situated (Schools Act, 1996). The researcher opines that, as much as the issue of redeployment is being misconstrued by the provincial education departments, they (PEDs) are acting within the mandate of the Ministry of Education. On the other hand, the Schools Act, sub-section 34, stipulates that the Ministry's personnel and funding policies aim to remove inequalities in education, both across and within provinces with the aim of personnel costs to schools on the basis of an equitable cost per learner in order to address the aim of redress and equity in the provisioning of quality education (Schools Act, 1996). Based on this, as an educator, rationalization and redeployment appears to be the best vehicle to achieve this.

On the other hand, the Schools Act provides that School Governing Bodies may establish extra-posts and appoint additional teachers. However, funding of these posts is generated through school fees and other fundraising initiatives (Mail and Guardian, 2014). It should be noted that schools catering for poor communities, the 'no-fee' schools, generally do not benefit from this provision and have to rely on the teacher allocations that the state makes in terms of its post provisioning policy. However, schools through their SGBs charge fees to make up for the shortage of teachers.

2.3.3 The Employment of Educators Act, 76 of 1998

Chapter 2 of the Act deals with general conditions of service and educator establishments whereas Chapter 3 deals with appointment, promotion, transfer and termination of serving educators. Of interest to this study, appointment and transfers are of importance with regards to rationalization and redeployment of teachers. This is viewed in terms of rationalization and redeployment in schools as appointments and transfers form the basis on which the process unfolds. Annexure 1 of the Act, spells out that educator post establishment of educational institutions is the competency of the MEC for Education (Schools Act, 1996). He/ she determines the post establishment of the province. Such posts are then distributed in terms of section 5(1) (b) of the Act to all the offices and educational institutions of the department including all public schools. According to annexure 1, the post provisioning model determines the relative need and priority, in respect of post provisioning of each educational institution and distributes the total available posts to these institutions in accordance with the relative needs and priorities. According to the Employment of Educators Act 76 of 1998, such needs and priorities are based on the following factors:

- Educational and organizational requirements in respect of class size,
- Whether or not more than one language medium of instruction is used,
- The number of school phases provided for,
- Disabilities of learners, and
- The size of the institutions.

The Act also stipulates that the number of weighted learners determines the number of posts to be allocated to an institution to utilize them in accordance with its needs in respect of its curricular, co-curriculum and extra-curricular activities. From the researcher's point of view, rationalization and redeployment seem to mostly cater for learner numbers and not the curricular, co-curricular as well as extra-curricular needs of schools. For instance, more often than not, the medium of instruction is always taken to be English but as a researcher and a teacher, he is pondering on what happens to the home language that learners are taught at various schools. This needs to be looked into. In the Alfred-Nzo West Education

District, learners in Foundation Phase end up being taught by a teacher who is conversant with only one home language, be it SeSotho or IsiXhosa, and the teacher has to teach both languages to the whole class. This may be further asserted by the same Act, Employment of Educators Act, 76 of 1998, when it states that “although a public school’s curriculum has a bearing on its post allocation, the inequalities that exist among schools in this regard are not taken into account by the model”. African languages (both IsiXhosa and SeSotho) are taught in schools as fully-fledged subjects and in areas such as Matatiele-Maluti, Mt Fletcher and Sterkspruit, but during post provisioning that seems not to have any bearing on post allocation to schools in these areas except for IsiXhosa as it appears on the post provisioning for schools for the 2017 academic year. This is despite section 12 of the Act.

2.3.4 Education Laws Amendment Act, 100 of 1997



This Act came into being after a number of education laws proved to have some loopholes that were never foreseen whilst being proclaimed. A number of Acts were amended as a result of this Act. Section 20 of the Schools Act was amended by the addition or insertion of subsection 4 which states that, *“Subject to this Act, the Labour Relations Act, 1995 (Act No. 66 of 1995), a public school may establish posts for educators additional to the establishment determined by the Member of the Executive Council”*. Clause 6 of the very Act states that an educator employed in a post established in terms of sub-section (4) must comply with the requirements set for employment in public schools in terms of this Act, the Labour Relations Act, 1995 (Act No. 66 of 1995) and any other applicable laws. It has to be noted that if a public school establishes posts for additional educators, payment of such educators is the responsibility of the school through its governing body.

The researcher has observed since the inception of rationalization and redeployment of educators, a number of schools, due to shortage of educators as a result of redeployment, end up employing the services of educators called, ‘SGB-paid-educators’. The SGB in consultation with the parent community of the school, determines the amount of money to be paid as remuneration to such educators. The amount is then divided by the number of

learners at the school to determine the amount to be contributed per learner towards remuneration of these teachers. However, this poses a serious challenge to schools that have been classified as 'no-fee' as it becomes difficult for parents to contribute on behalf of their children, and no sanction can be imposed on such parents. It is for this reason that this study also looked into the educators and SGBs' perceptions on rationalization and redeployment of educators.

Various studies have been conducted by different researchers; such as Thedi (2004); Bharath (2004); Zokufa (2009), Ledwaba (2007); and Lindley (2013) but none has ever explored the perceptions of educators and SGBs on rationalization and redeployment. Focus has been on different aspects that relate to the topic.

2.3.5 Circular number 23 of 2015



This policy was intended to alert stakeholders about the impact, challenges and suggested improvement strategies of the implementation of education policies in the schooling system (ECDoE, 2015). This shows that there had been some challenges with the implementation of a variety of policies of the department in the Eastern Cape. The then Superintendent-General (SG) in the Eastern Cape conceded that the difficulties have been caused by improper communication, leading to demoralisation and disillusionment among teachers. It also highlights that there had been concerns and complaints around some education policies which are seen to be difficult to implement or unrealistic, hence non-compliance on a number of policy imperatives, low staff morale and dysfunctional schools. Netshilaphala, the then SG, observed that a number of policies that are being implemented in the education sector are affecting schools in different ways, positively and others negatively (Circular 23 of 2015). In the same circular, the former SG, also contends that the absence of the voices of the members of the school governing bodies, school management teams and learners about the impact of implementation or lack thereof of these policies in schools presents some challenges. It is true, most of the policies are formulated for school management teams, teachers and the governing bodies to

implement without having had a say at the development stage hence the difficulty in implementing them. Rationalisation and redeployment is one such policy that the former SG was alluding to because parents through SGBs were never put on board in so far as the redeployment of teachers is concerned.

2.3.6 Collective Agreement number 4 of 2016

The purpose of this agreement was to replace the provisions of Collective Agreement 2 of 2003 with regard to the transfer of serving educators in terms of operational requirements (ELRC, 2016). When looking at this agreement, it becomes clear that the wording used in the collective agreements might add and lead to confusion, as there is always what might be termed 'contradiction' within the same document. B.6.4 of the Collective Agreement states that the procedure for the identification of serving educators in addition to the establishment as a result of operational requirements need not be performed on an annual basis, but must be performed at least once every 36 months. This created an impression that the identification of educators in addition to the establishment will be done at least in 2019, but the process is still ongoing after 2016. Coupled with that is B.6.4 which states that the time period of 36 months will not negatively affect the creation and/or filling of posts, grading of schools or any other personnel related matter, in terms of relevant and applicable provisions during that period. This caused confusion among educators and teacher formations.

2.3.7 Human Resource Management Circular 31 of 2016

This circular is confirming the confusion caused by the wording of the previous one, number 4 of 2016. When looking at the contents of this circular, especially the outcome of the court judgement, the union SADTU, in Grahamstown, was of the opinion that Circular number 4 of 2016 was taking a 3-year period of non-identification as the bottom line, hence the

issuing of the notice of 6 April 2016 to its members directing them not to participate in any matters that are related to redeployment of educators. This also sheds light on how contested the issue of redeployment of educators is and/has been to date. It remains to be seen if this circular will last long or if it will be followed by a series of others before 2020.

2.4 RESOLUTIONS OF THE EDUCATION LABOUR RELATIONS COUNCIL (ELRC)

2.4.1 Resolution number 5 of 1998: Transfer of serving educators in terms of operational requirements.

The purpose of this agreement was to provide measures in terms of the Labour Relations Act 66 of 1995 to accommodate the obligations of the employer against the role of the SGBs in making recommendations in the appointment of educators (ELRC, 1998).

The resolution deals with the transfer of serving educators in terms of operational requirements as well as the advertising and filling of educator posts. Operational requirements are based on change in learner/pupil enrolment, curriculum changes within a specific education institution, the change to the grading of schools and financial restraints. Section 1.3 of the resolution states that all vacancies that arise at an education institution must be offered to serving educators displaced due to operational requirements of that provincial department (ELRC, 1998). Sub-section 1.3.5, clearly indicates that this resolution was meant also to cater for displaced educators who were in the institutions that were under ex-Departments of Education and Training, and homeland governments in the TBVC states for rationalization purposes as per operational requirements (ELRC, 1998 ss (a)-(d)).

Schedule 1 of the agreement deals with the advertisement of vacant posts and the subsequent filling thereof. As much as the agreement is clear to state that the existence of vacant posts must be made public by means of an advertisement in public media both provincially and nationally, this seems to be overlooked. It also stipulates that the gazette,

bulletin or circular must be circulated to all schools within the province. Schools have long last had that privilege when looking at the recent advertisements. In the Eastern Cape, advertisement and filling of vacant positions led to a series of court orders to have such vacancies filled.

Clause 2 of the agreement states that the employing department must acknowledge receipt of all applications in writing, and indicate whether the application is complete or not, but according to the researcher's experience in the teaching fraternity, this seems to be used as a way of eliminating the candidate out of the list of candidates eligible for interviews as there has never been such a situation. As much as sub-section 3.6.4 clearly states that there should be no more than five candidates shortlisted, several observations point out that, there have been more than the prescribed number of shortlisted candidates in the then Matatiele-Maluti Education District. After observing all the stipulated proceedings related to shortlisting and interviews, the SGB must submit their recommendations to the provincial education department in their order of preference. As per resolution, the employer has to inform all unsuccessful candidates, in writing, within eight weeks of an appointment being made. This is, according to the researcher's observation, just an illusion, as it has never happened in most districts where the researcher has been interviewed before. Transfers may take place for various reasons including redeployment or secondment to other departments. Having explored the contents of this resolution, the researcher is of the opinion that it would be most appropriate to look at the following resolution which deals with the procedure for rationalisation of educators.

2.4.2 Resolution number 6 of 1998: Procedure for rationalization of educators in the provisioning of educator posts.

The objective of this agreement is to achieve equity in educator staff provisioning within institutions in terms of approved policy on educator post provisioning. According to the resolution, the process of redeployment is compulsory and educators will be redeployed via transfers as per the Employment of Educators Act number 76 of 1998 (Bharath, 2004).

Annexure A of this agreement consists of principles guiding the process of carrying out the procedure for rationalization. To single out one important principle, “all avenues should be explored to ensure the continued employment in education of educators who occupy posts which are classified as in excess in terms of these procedures” (ELRC, no 6. 1998: 3.3). Different structures with specific responsibilities were formed in order to carry out the processes that go with these processes. 5.1. of the agreement states that the Head of the province shall notify educational institutions of its post provisioning, which may increase or decrease the number of posts in a particular institution. This depends mostly on the learner enrolment in a school which determines the learner to teacher ratio.

After posts have been determined, procedurally, though it does not happen, the circuit manager together with principals have to determine posts that are in excess of the approved staff establishment as well as the vacant posts. In making so, the circuit manager must take into consideration the curricular needs and circumstances of the educational institution. Principals are required to convene a staff meeting wherein information regarding the post provisioning and its effects on their school/institution have to be brought to the attention of the staff. This encourages transparency and consultation but renders educators insecure (Thedi, 2004). According to clause 6.2.1 of this agreement, after the formal staff-meeting the principal may recommend that educators who may be declared in excess be absorbed in vacancies that exist or will exist within the next six months at that educational institution to the head of the relevant provincial education department whilst observing lines of communication. The recommendation may be accepted or rejected.

One other most important aspect mentioned in 6.2.2 (c) is that the Circuit Manager/District Director must make sure that there is no direct relation between a post identified as in excess and an educator who will be declared in excess. The researcher believes that this was included in order to curb a situation where some educators would be treated unfairly by some principals for a variety of reasons other than redeployment. The new procedures for rationalization and redeployment ensure trade union representation at all levels of the process. This was and is meant to protect the individual against victimization and entrenches the principle of redress and equity (Bharath, 2004). The principle of last in first out (LIFO) may be used where two or more teachers are competing for the same post. This

is one principle that poses some challenges when interpreting, as it does not relate to the arrival at a particular institution, but the period of continued employment without any break in service in the department (ELRC, 1998). SADTU members and principals were never work-shopped sufficiently and, as a result, many principals used rationalization and redeployment process to 'get rid' of educators they believed were 'trouble-makers' and, as such, SADTU members were unable to prevent this victimization (Bharath, 2004). As stipulated in 6.4, particulars of educators in excess shall be included in a provincial redeployment list with full details pertaining to the excess educator and be matched against vacant posts compiled by the provincial department which should include requirements for the posts.

If one were to look at 6.4 of the agreement, 6.4.4 states that, among the particulars to be included about the educator, is the preference with regard to redeployment. If this were to be done accordingly, only schools that are easily accessible would be staffed properly as against deep rural schools that are prone to teacher redeployment due to emigration of people to well-serviced areas. This is said in the wake of Anzia and Moe's (2014) assertion that, when changing schools, teachers are likely to move from disadvantaged schools into schools that are advantaged in all respects.

One of the most important triumphs of this resolution is that it guaranteed the permanent appointment of all temporary educators appointed before 1 July 1996 in a substantive vacant post where such educators met the minimum requirements for the appointment. It also protected educators from the historically disadvantaged institutions who did not meet the minimum requirements for appointment but had been employed on a continuous basis for a period longer than ten years. Such educators were to be treated in the same way as permanent educators for the purpose of rationalization and redeployment. Promotion posts would be advertised in an open vacancy list and any serving educator would apply for them (ELRC, 1998).

After all due observation to these procedures, the relevant provincial education department list must be drawn up in such a manner that it reflects vacancies per circuit/district level, and only educators in excess may apply. Procedures for rationalisation of educators as well as provisioning of educator posts had to be treated with great care in order to cater for

equal or fair distribution of educator workload, and avoid a situation where there would be teachers that are overloaded (ELRC, 1998). The issue of workload is addressed in the following section that deals with the workload of school-based educators.

2.4.3 Resolution numbers: 7 of 1998: Workload for school-based educators

Teaching load allocation, that is, which teaching staff teaches which subject, is an essential task that is carried out in all teaching or research institutions every year, and has been well recognized as a major contributing factor to the teaching quality (Qu, Wang, Easa & Liu, 2014). These authors contend that teaching load should strive for three objectives, namely-

- All subjects must be taught.
- A teaching staff should not be allocated a higher teaching load than that required by his/her role.
- Teaching staff should teach subjects that they are proficient with; otherwise they have to struggle with effectively managing teaching tasks (Qu et al., 2014).

According to resolution 7 (1998), it is only fair to expect educators as part of the broader public service to work a minimum of 1800 actual prescribed hours per annum after allowance for absences such as leave, sick leave and for rest periods (ELRC, 1998). A study conducted by the Saskatchewan Instructional Development and Research Unit (SIDRU, 2013) on the Challenges of Intensification of Saskatchewan Teachers' Professional Time contends that teachers' time is over-simplified by policy-makers and administrators who tend to reduce the complexity of teachers' time into discrete categorizations (SIDRU, 2013). According to this study, in the context of teaching, work intensification refers to how teachers are subjected to increasing external pressures, such as demands from policy-makers or broader societal expectations. The study further asserts that such categorizations seem narrowly focused on students' time, rather than being inclusive of teachers' time. As such, 1.3 of Resolution 7 outlines the core duties of educators of which 1.3.1 deals with duties during formal school hours. These include but are not limited to: scheduled teaching time, extra and co-curricular duties, administration,

supervisory and management functions, planning, preparation and evaluation, pastoral duties, professional duties as well as relief teaching. On the other hand, 1.3.2 stipulates core duties outside the formal school day. Such duties include extra and co-curricular duties, professional duties, professional development and planning, preparation and evaluation. Such time does not include teachers' personal time. Accordingly, each post level within a school has different duties and responsibilities apart from the core duties as they appear in 1.3, despite the fact that there should be an equitable distribution of workloads between various post levels to ensure that one or two of the post levels or an educator are not overburdened (ELRC, 1998). All educators are expected to observe a period of seven hours a day being at school for duties stipulated in 1.3.

In summary, principals' teaching time varies according to the level of the schools where they manage. In primary schools, principals are expected to spend between 10% and 92% whereas in secondary schools they are expected to spend between 5% and 60%. As much as primary school principals are expected to teach as prescribed, the researcher's assertion is that this might create some challenges for principals because in both school levels principals are accounting officers. Deputy principals have a fixed period of 60% in both categories of the schools. On the other hand, the researcher doesn't feel that it is fair for teachers in the same post levels in the two categories of schools to be allocated different percentages yet what is done in both categories is the same. Mulkeen and Chen (2008) have indicated that monitoring, as part of the principal's sphere of operation, is more difficult more so in rural areas. School principals often travel to district offices to make administrative arrangements (Mulkeen and Chen, 2008). Citing the case in Uganda, Mulkeen and Chen (2008) highlight a situation where the principals leave schools to negotiate teacher transfers or to ensure that their teachers receive salary increments. They further contend that the further or more remote the school, the longer the principal is away from the school for these purposes. It is the researcher's observation that principals in such situations do not bring justice to classroom teaching, which extends to learners they are supposed to teach. This propels the researcher to feel that further research on effectiveness of principals' classroom practices and the litany of responsibilities on their desks needs to be explored. On the other hand, it is not every school that qualifies to have a deputy principal as per the staffing model currently in use.

These resolutions were just an endorsement of the Personnel Administrative Measures (PAM) as they appear in the Employment of Educators Act, 76 of 1998. Resolution 7 does not take account of the unequal teaching load between the principal and other educators when rationalization and redeployment of the teaching corps is applied. This results in some members of the staff being under tremendous pressure due to schools being understaffed. Rationalization and redeployment was ushered in by the new schools' staffing model and seem to have led to some anomalies in some schools as timetable clashes occur when there are too few classrooms or teachers per school (Chisholm, 2005). In Chisholm's study on educator workload, in one school she discovered that one teacher had three clashes on her timetable. Teachers' work entails a number of responsibilities as well as duties, and below is a snapshot of what the other resolution stipulates around this issue.



2.4.4 Resolution number 8 of 1998: Duties and responsibilities of educators

According to the PAM, the ability of our education to compete in an increasingly global economy depends on our ability to prepare both learners and educators for new or changing environments (EEA 76 of 1998). Teachers' duties and responsibilities have changed since the reforms that swept the floor since from the early 1990s were introduced. As the researcher is a teacher, he believes that this started from curriculum reforms that ushered in a lot of paper work that teachers are engaged in day-in and day-out.

Over the past 20 years, teacher organizations in Canada have undertaken surveys and studies to analyse and assess the work lives of teachers (SIDRU, 2013). These studies helped researchers and policy-makers to understand the complexities of teachers' work and the demanding nature of their job. They also unearthed the negative consequences associated with heavy teacher workloads, including diminished teacher health, job satisfaction and personal lives (SIDRU, 2013). According to SIDRU, the growing body of literature relating to teachers' time, workload and work-life balance indicates clearly that "teachers' duties and responsibilities have been increasing in both complexity and volume over the past years" (SIDRU, 2013, p. 7). The researcher concurs with the forgone

contention in view of the fact that several reforms have been initiated for the classroom practice which demand too much of the teachers' time than it used to be before 1994 in South Africa. It also surfaced from the studies conducted in Canada that, on average, full-time teachers spend more than 50 hours per week on work-related activities.

Resolution 8 of the ELRC (1998) stipulates in its introduction that management in education should be able to draw on professional competencies of educators, build a sense of unity of purpose and reinforce their beliefs that they can make a difference. The researcher opines that this is a very noble pronouncement and objective in so far as education in South Africa is concerned. The resolution first looks into the principal, the head of the institution, and key to this is ensuring that the school is managed satisfactorily and in compliance with the relevant pieces of legislation and personnel administration measures as prescribed. Cognizance of the fact that the duties and responsibilities are individual and differ, depending on the approaches and needs of different schools, is not overlooked (ELRC, 1998). This proves that resolutions are made taking into account the welfare of the purpose for the existence of every institution. In modern language, the principal is the accounting officer for his/her school. It is this person who is always held accountable for whatever happens at school. Education Minister, Angie Motshekga, has in 2017 pronounced over media that principals of schools who could not manage to make learners pass the 2016 National Senior Certificate examinations should be made to account for this. Subsequent to that, in our province, the Eastern Cape, principals of schools that could not meet the 60% threshold were issued with letters demanding an explanation for failure to meet such a requirement. A general concern that transpired prior to the issuing of such letters was that, the Peter Morkel model, which is used for determining the number of teachers per school, needs to be reviewed. When looking at the concept 'accountability' several definitions have been provided by different scholars. Argon (2015) provides a few definitions. He states that accountability may be defined in terms of providing information to an authority related to one's practices; holding a person or organization responsible to an authority regarding the activities in question; liability to provide answers and explanations; and a process of providing explanations to a specific authority about tasks and practices (Argon, 2015). The researcher is of the opinion that, as much as this activity is mandatory, it may be difficult for principals of schools with fewer teachers to carry out

this function properly as most of his/her time is divided between the classroom and administrative duties.

Concurring with the foregoing argument, Lock and Lummis (2014) state that the role of the principal is changing due to increased demands external to the school and is placing leaders more as administrative agents of government and taking them away from the crucial roles of school leader and driver of education leadership within the school (Lock & Lummis, 2014). The principal's duties spread across a variety of very strong and purposeful disciplines, including, administrative; personnel at the school; teaching; extra- and co-curricular; communication and interaction with stakeholders (ELRC, 1998). With regard to administration, his/her duties include, among others, ensuring that the Departmental Circulars and other information received which affect staff are brought to the attention of the staff as soon as possible and stored in an accessible manner. The resolution further states that, the principal has to ensure that the workloads are equitably distributed among staff and he/she has to engage in class teaching as per workload of the relevant post level and the needs of the school. The principal is also expected to co-operate with members of the staff and the SGB in maintaining an efficient and smooth-running school. He is the spokesperson of the school in all matters affecting the school and concerned with the department (DoE). Once again, when posts are declared, the number includes the principal yet more often than not he/she is expected to be in class, engaged in teaching and learning for fewer hours than other educators. In considering Mulkeen and Chen's (2008) argument above, the researcher feels that principals may not do justice to all of these duties in the manner which is expected of him/her. This is further affirmed by the conclusion made in the survey of Western Australian public-school principals commissioned by the Secondary School Teachers Union of Western Australia where it was found that principals are overloaded with work, unsupported and under resourced to the point that children's education is at risk (Lock & Lummis, 2014). Rationalization and redeployment of teachers' policy seems to ignore such adversaries and detractors to teaching and learning.

The above argument is further accentuated by Dibbon (2013) when he says that available research on teacher workloads and stress, states that teacher workloads are excessive and intensive, and the negative effects associated with an unrealistic workload are having

a considerable impact on teachers and the quality of their work-life as well as on students and their academic experience. During redeployment the principal is the sole person who is charged with providing the education authorities with the necessary information relating to statistics required, and sometimes very much against their will depending on how it will affect their school's situation.

A study conducted by Browns (2015) indicates that multiple responsibilities serve as a source of stress among principals, as today's principals have heavy workloads. Citing Boyland (2011), Browns posits that increased demands placed on principals have led to increased amount of job related stress. This is further compounded by task overload and insufficient time to complete tasks (Boyland, 2011). According to Browns (2015) many participants (principals) felt overwhelmed by managerial duties at their schools and also felt frustrated that their workload negatively affected the amount of time they could devote to instructional leadership. This might imply that principals might also be frustrated by redeployment of teachers as well as the rationalization of schools.

The second category of educators that the resolution addresses with regard to duties and responsibilities are, deputy principals. In this category, more often than not, reference to "assisting the principal" is made to the duties and responsibilities. The most distinguished role among duties and responsibilities of the incumbent is "to be responsible for school curriculum and pedagogy: choice of textbooks, co-coordinating the work of subject committees and groups, timetabling, "INSET" and developmental programmes, and arranging teaching practice. His/her duties lean more on curriculum delivery at the school (ELRC, 1998). This is the first position that is at stake every time redeployment is to be implemented as its existence depends on the number of learners/learner enrolment at the school. The majority of schools do not qualify to have deputy principals ever since the inception of the policy of rationalization and redeployment. The workload for both the principal and deputy principal is minimal compared to other teachers as far as classroom teaching is concerned.

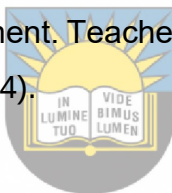
Just below the deputy principal is another layer/level of head of departments (HoD). According to this agreement, the aim of the job is to engage in teaching, be responsible for effective functioning of the department and to organize relevant/related extra-curricular

activities so as to ensure that the subject, learning area or phase and the education of the learners are promoted in a proper manner. This is one of the posts that not all schools normally have as its existence depends on the number of teaching posts each school is allocated. According to the post provisioning norms, every 7th post is meant for the HoD and some schools have less than seven educators.

The HoD is the person responsible for curriculum delivery at school as he/she is expected to provide guidance on the latest ideas on approaches to the subject, method, techniques, etc. in his or her field and effectively convey these to the staff members concerned, and he/she has to control the work of educators and learners in his/her department. With regard to communication, the HoD has to co-operate with staff in order to maintain a good teaching standard and progress among the learners and to foster administrative efficiency within the department and the school (ELRC, 1998). In two or three teacher schools, it means that the principal will have to do all these duties and as a result teaching and learning might be affected.

The last category of educators is that of post level 1 teacher who is expected to engage in class teaching and ensure that education of learners is promoted in a proper manner. Among the core duties and responsibilities, the Employment of Educators Act stipulates that it is to engage in class teaching which will enhance a purposeful progression in learning, which is consistent with the learning areas and programmes of subjects and grades determined (ELRC, 1998). This does not exclude subjects as in the Further Education and Training (FET phase, there are subjects whereas in the General Education and Training (GET) phase, there are learning areas. A post level one educator has to assist the HOD in identifying aspects which require special attention and to assist in addressing them (ELRC, 1998). In a nutshell, the educator is responsible for delivering the core business, teaching and learning (ELRC, 1998). These are the people who spend a significant amount of their personal time problem-solving and preparing themselves to respond adequately to students who struggle. They are concerned about their students who might not always be getting support at home. Delivery of the core business at school might be enhanced if schools are well-staffed (my observation).

The issue of learner to teacher ratio which is dependent on the school's enrolment also determines the class size. Research and common sense suggests that class size can help improve the quality of classroom experience for both the teacher and the student (Dibbon, 2004). The researcher feels that this is a different argument to the policy intentions of the rationalization and redeployment of teachers as well as realignment of schools thereby creating viable schools (Directorate of Rural Education, 1997). This is evidenced by the fact that, as per rationalization and restructuring of the schooling system in the country, small schools are being closed and teachers redeployed. According to Dibbon (2004), small class size means more individual attention for the student which subsequently means higher student achievement for all (Dibbon, 2004). On the other hand, it means more time devoted to the individual student for the teacher. Dibbon (2004) further states that research has confirmed that small classes do yield significant benefits for students, especially in the primary schools when classes contain less than 20 students. This might be an illusion under rationalization and redeployment. Teachers' morale and job satisfaction are boosted by reduced class size (Dibbon, 2004).



2.5 RESPONSES OF TEACHER UNIONS TO RATIONALISATION AND REDEPLOYMENT

Any genuine desire to improve teaching and learning must be necessarily concerned with the environment in which teaching occurs (Bascica & Osmond, 2013). The researchers further contend that one of the primary functions of teacher unions is to act as the vehicles by which teachers' concerns about the conditions of teaching and learning reach the attention of policy-makers. Where teachers have little formal authority to participate in policy discussions, and where policy-makers have little knowledge about the dynamics of educational practice (Bascia & Osmond, 2013), the teacher unions' role is critical. Teacher unions, according to Bascia & Osmond (2013), are sites where new policy ideas are developed. Ben Levins (2010) in Bascia & Osmond (2013) asserts that all top performing countries on international measures have strong teacher unions that play an active role in education decision making and participate in setting the educational reform agenda. In

Sweden, for instance, the Swedish political system (Bascia & Osmond, 2013), requires that unions and other organizations and authorities receive government proposals ahead of their formal presentation in parliament, and are expected to comment upon them and recommend revision.

Teacher unions have influenced education policy and social change throughout their history; conversely, the development and history of teacher unions is closely related to their political relationship with the government of the day (Govender, 2004). Because of their role in policy implementation, teacher unions are able not only to sabotage or promote reforms but also to influence the views of citizens about government performance (Govender, 2004).

Literature further goes on to say that policy texts cannot be read separately from their implementation, nor can they be delinked from political and financial commitments to support them, and most significantly, policy-making cannot exclude those who are most affected by them from generating and/or developing solutions (Vally & Spreen, 2004). Teacher unions, more so SADTU as representatives of teachers, who are affected by redeployment and rationalization, did represent teachers as the most affected group by the process and negotiated a solution that saw the process saving teachers from retrenchment.

The researcher opines that there is no single teacher union that is formed outside the framework of any political organization's ideology. It is against this assertion that the so-called "Giant Teacher Union", SADTU, was formed under the auspices of the ruling party, the ANC. SADTU is an affiliate of the Congress of South African Trade Unions (COSATU), which is an alliance of the ruling party. Govender further states that the experience of teacher unions in South Africa is not unique by pointing out that before the 1960s; members of National Education Association in the United States were viewed as 'handmaidens' of the state, and functioned as agents for the preservation of the status quo; whilst the national teachers' unions in Korea and in Mexico were viewed as serving to legitimise the decisions of state elites and not the interests of educators (Govender, 2004).

In the initial years of the policy on rationalization and redeployment, teacher unions were able to challenge the implementation process following some flaws that had been picked

up. Some of the flaws relate to the information that was insufficient and inaccurate, for example, the number of learners in a province, the number of teachers in the system in a province (Mthombeni, 2002). Such led to some delays in the implementation stage of the policy and subsequently its suspension in 1999. Mthombeni states that by April 1999 four provinces out of nine had challenged the process due to inaccuracies in information like the number of educators; and schools, and learner enrolment. The policy implementation had not started in the Eastern Cape. This was due to the union suspending the process in early 1999. Also, in the Free State Province, the unions challenged the Provincial Department for incompetently handling the process. Lack of accurate information also cropped up. The teacher unions challenged it. In KwaZulu-Natal, the process had not started due to a clash between the department and the unions due to inaccurate statistics (Mthombeni, 2002). Mthombeni (2002) further states that the department was accused of lack of capacity to manage transformation as it was alleged that some principals had inflated learner numbers. This was the case as well with the Northern Province where the department and teacher unions were not on the same page with regards to accurate information as well as the management plan for the implementation process. Such clashes between the department and teachers were never reported in Gauteng, Mpumalanga, Northern Cape, North-West and Western Cape. This does not mean that there were no challenges in these provinces as in North-West; for example, 315 disputes had been resolved and 201 so-called “ghost teachers” had been identified (Mthombeni, 2002).

Zengele (2014) contends that, in SA, there was a proliferation and a growing intensity of teacher unionism posing challenges because of the power of the state that manifests itself as a repressive state apparatus (RSA), together with the unions as ideological state apparatuses (ISA) (Zengele, 2014). South African teacher unions currently enjoy a closer relationship with the government than they did before 1994 (Govender, 1998). Govender further posits that teacher unions have influenced education policy and social change throughout their history. The development and history of teacher unions are closely related to their relationship with the government of the day (Govender, 1998). This poses a serious inclination to say rationalisation and redeployment of teachers in SA was a concerted effort by the unions, more so SADTU and the present government in the ELRC, in trying to avert

retrenchments, as GEAR introduced fiscal austerity into education provision and the DoE put forward a policy of reduction in the teaching staff (Akoojee & McGrath, 2003).

2.6 THE PRINCIPLE OF FAIRNESS AND JUSTICE

There is very little literature written about this subject in education circles though it is a very important one to reflect on; based on the fact that the researcher is convinced that all communities have to be treated fairly and with justice in relation to the provisioning of education.

The principle of fairness and justice is one of the most renowned human rights principles in the whole world and it has been cherished throughout human existence. Testimony to this is borne by the writings of Herbert Hart, John Rawls and other scholars. Similarly, Robert Nozick (1974) posits that this right is a powerful right which seems to make it plausible that no new rights “emerge” at a group level, that individuals in combination cannot create new rights which are not the sum of pre-existing ones (Nozick, 1974). Boughardt (2011); notes that, in terms of rationalisation and redeployment, the teacher can be seen as just a number or a name on a piece of paper that is dealt with in a very clinical manner, and further contends that principals are in a way forced to deal with the matter of redeployment in such a clinical manner as they are constantly reminded about the fact that procedural fairness should prevail (Boughardt, 2011). He also states that, while ensuring that the process is fair in every respect towards the people affected, it can make them feel detached and in the process, forget that they are actually working with human beings who have feelings and emotions. Affected teachers then look at the principal as unsympathetic, detached and cruel (Boughardt, 2011). The researcher views this statement with great concern because of the situation that ensued in a school where parents locked the gates because of a teacher who was redeployed and blocked the entrance into the school premises. The blame was shifted to the principal who was accused of having expelled the said teacher, yet this was a matter of policy implementation.

Kucerova and Kucera (2012) contend that education provision is typically concentrated in settlement centres within higher levels of the settlement hierarchy. They further state that inhabitants of core urbanized areas have better access to education than inhabitants of remote rural peripheries (Kucerova & Kucera, 2012). As is the case in hand, rationalization and redeployment of teachers is rife in remote rural areas as against other areas. The depopulation of many rural areas and low fertility rates in developed countries make it difficult for many small schools to fill their enrolment capacity (Kucerova and Kucera, 2012). However, this does not mean that subjects and/or learning areas in such schools are also reduced. As earlier alluded to, small rural schools are prone to closure which in turn disadvantages children from such communities.

Similarly, a report and recommendation by the Education Trust in the United States, as stated by Peske and Haycock; (2006), posits that learners in low-income groups and minority children enter school without the knowledge and skills that they need to succeed. The unfortunate part of it, according to Peske & Haycock (2006), is that, rather than organizing the educational system to pair these learners with expert teachers, who can help them to catch up with their more advantaged peers, the opposite is done. Such learners are assigned, on average, to teachers with less experience, who are less educated and less skilled than those who teach other children (Peske & Haycock, 2006). Accordingly, the researcher has observed that experienced teachers on redeployment would always opt for schools that are easily accessible, with more facilities than schools that are in disadvantaged areas with less resources and poor infrastructure. Poor and minority children get fewer than their fair share of high-quality teachers. Worthy of note is the fact that classes in high poverty and high minority secondary schools are more likely to be taught by “out-of-field teachers”, that is, teachers without a major or minor subject they teach (Peske & Haycock, 2006). The researcher feels that the same could happen with the rationalisation and redeployment of teachers, more so, where fewer teachers remain after the process. Under no circumstances can learners be left without a teacher for a particular subject, especially for the hard to learn subjects like Mathematics and Science, though Mathematics can sometimes be taught by those teachers who once did it in secondary school but did not specialize in it. The researcher feels that Physical Sciences

need specialist teachers. It is therefore not fair and just to assign learners to out-of-field teachers.

According to the South African Constitution, Act 108 of 1996, every citizen has the right to fair and just treatment (S33), (1) everyone has the right to administration action that is lawful, reasonable and procedurally fair. In order for the fair implementation of any policy affecting employees and the community being served, the researcher aligns himself with the statement that; it is imperative for proper consultation to be prioritized (Advisory, Conciliation, and Arbitration Services, 2005). Consultation, as is the case with rationalization and redeployment, does not mean that the employees' views always have to be acted on since there may be good practical reasons for not doing so. However, when employees' views are rejected, the reason for doing so should be carefully explained. Equally so, where the views and ideas of employees help to improve a decision, due credit and recognition should be given (Advisory, Conciliation and Arbitration Services, 2005). The researcher also feels that teachers and learners have been unfairly treated by rationalization and redeployment in some schools, as they are not treated equally as teachers' workloads may not be equally distributed due to varying environments. After exploring this Constitutional imperative, the researcher delved into one other key Constitutional imperative which has to be observed by all citizens within the Republic of South Africa and which is enshrined in Chapter 2, the Bill of Rights.

2.7 THE PRINCIPLE OF EQUALITY

The South African Constitution 108 of 1996, chapter 2, The Bill of Rights, section 9 (1) states that everyone has the right to equality before the law and has the right to equal protection and benefit of the law. The majority of countries in the world strive for equality as informed by the international Human Rights Declaration of 1948. This seems to be an imperative for every country globally. South Africa is no exception to the declaration as testimony could be borne by the supreme law of the country, the Constitution. Sub-section 2 of the Constitution also emphasizes that the right to equality includes the full and equal

enjoyment of all the rights and freedoms. To promote the advancement of equality, legislative and other measures designed to advance persons, or categories of persons disadvantaged by discrimination, may be taken (RSA Constitution, 1996). Rationalization and redeployment in schools seems to have been taken care of in this regard as more teachers were concentrated in urban, semi-urban and town schools and very few and desperate ones would accept postings to rural schools. Once again, the supreme law of the country, chapter 2, the Bill of Rights, section 29(1) (a), claims that every child has the right to basic education.

In 1994, the ANC-led government of national unity inherited a racially divided and highly discriminatory education system described by Nelson Mandela, at a reception held in his honour in February, 1990, as 'a crime against humanity' (Lemon, 2004: 270). In turning things around, Lemon (2004) states that elements of a market-driven system were introduced in historically white schools in the early 1990s, ceding control to governing bodies of 'Model C' schools to which the physical assets and maintenance costs were transferred, leading to the admission of small numbers of black pupils but at fee levels affordable only by middle-class parents (Lemon, 2004). Based on this assertion, the researcher feels that this was another pursuance of inequality as parents who could not afford the fee had to accept their situation that their children could not be admitted, even though this was a bitter pill to swallow. Following a comprehensive survey, Lemon (2004) posits that a comprehensive survey of needs in the country's schools revealed not only deep inequality, but also the conditions of deprivation and extreme neglect in which the majority of children continue to be educated. With regards to rationalization and redeployment, most commentators comment on previously black schools whilst on the other end very little is being said about former white schools except that teachers from their schools refused to move to disadvantaged schools. Lemon (2004) posits that each province has its own formula for calculating the quota of teachers to which each school is entitled; teachers above the quota are placed on a redeployment list. The big question is, *"Is equality a real priority for the democratic Republic of South Africa as a unitary state?"* Perhaps, the main challenge is that the central government is often unable to change the speed and direction of policy implementation in the provinces, since this would require

stepping over the fine line between national power and provincial competencies (Lemon, 2004).

As South Africa entered the democratic dispensation, there was a dire need for reforms to be implemented to remedy the situation of the past. Central to the reform process is the ideal of reconstruction and development (Soudien, 2007). There had been unequal funding for education and a legacy of disparity in white schools, Coloured schools, Indian and African schools and the new democratic government declared its intention to achieve equity and equality in the education system (Soudien, 2007). Soudien (2007) further posits that the establishment of a single national ministry of education was a major achievement, and the first challenge was to equalize per capita expenditure and resource commitment within it. A very crucial matter was to address the differences in pupil-teacher ratio between white schools and African schools. In white schools, ratios as low as 20:1 were prevalent whereas in African schools, ratios as high as 80:1 were very common (Soudien, 2007). In a survey conducted by Gasant (1997), respondents to the question of whether the rationalisation process would bring about equality, 34.5% responded positively. About 47% respondents were of the opinion that it was not the most effective means of achieving equality in education (Gasant, 1997).

Based on the forgone assertion, the researcher is of the opinion that rationalization and redeployment has done very little to protect learners' right to equality and also quality education as it is very possible for learners to be taught by unqualified people in certain subjects, and when learners are taught by three or four teachers in seven grades due to low or deemed to be low enrolment, while others are taught by a sufficient number of teachers, it automatically translates to inequality. The researcher's assertion is based on the outcome of Gasant's (1997) survey and also Griggs and Hyland (2002) who contend that when workforce reduction occurs through downsizing, the number of tasks to be accomplished within the organizational network remains the same but fewer people are available to accomplish the tasks. The researcher feels that, even if enrolment declines, the number of subjects or learning areas offered at a particular school remains constant. The ultimate result in such cases is that learners are taught by teachers with no expertise in certain subjects and/or learning areas, and yet expected to perform equally with those

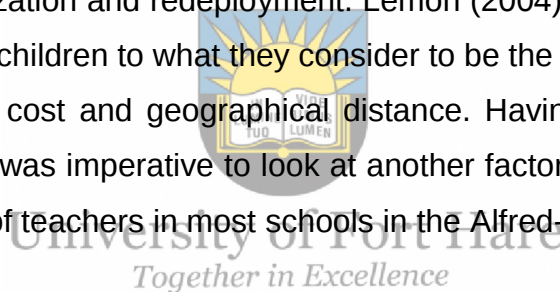
that have enough teachers. The issue of redeployment seems to have been taken good care of in Guinea where vertical redeployment was applied. This meant transferring secondary teachers with only primary qualification to teach in primary schools (Conde, 1995). This seems to be contrary to the situation in the Alfred-Nzo West Education District where teachers with primary school qualification are sometimes redeployed to secondary schools. The implementation process of the policy on rationalisation and redeployment of teachers in schools poses such a challenge for learners in some schools. This right thus seems to be partially applied and serves learners unequally. Teacher allocation and redeployment is an important provincial responsibility that is critical to achieving greater equity in the school system (Lemon, 2004).

Valley and Spreen (2004) argue that education reform is situated within a policy frame that privileges cost recovery and fiscal austerity measures linked to a self-imposed structural adjustment programme. This assertion strengthens the fact that, rationalization and redeployment had to be considered in South Africa due to personnel costs in the Department of Education. Valley and Spreen (2004) further argue that the original intention to ensure equity in the schooling system through re-distributional measures has been largely subverted by imperatives of budgetary constraints linked to macro-economic policies. In their research, Valley and Spreen (2004) comment that when policies were being introduced into schools, unions like SADTU criticized the government for failing to prevent overcrowding, failing to prevent additional costs of financing education being passed on to schools and subsequently to parents, and failing to create a funding mechanism to address the disparities between the previously advantaged and the previously disadvantaged. According to the researcher, it is common nowadays for parents to pay fees at school that are meant for payment of additional teachers by SGBs for subjects that do not have teachers with expertise to teach, and to ease the unrealistic workloads which have a negative impact on the quality of teachers' work-life as well as students and their academic experience (Dibbon, 2004).

This is augmented by the fact that pupils of the so-called 'well-to-do' families easily gain access to former Model C as well as independent schools where there are always enough teachers as against those from poor-family backgrounds due to costs involved in such

schools (Bharath, 2004). This is caused by the fact that when the number of teachers decline at schools situated in remote rural areas, middle-class parents take their children to town schools where they will enjoy tuition by enough teachers, with each subject and/or learning area taught by each educator per class, and no multi-grade teaching. It is the researcher's assertion that this creates inequality between learners of poor families and those of the well-to-do families.

A report by *City Press* (2015) indicated that lack of basic infrastructure and vital learning equipment is one of the things that school children have to contend with, despite the country's transition to democracy over the past 21 years. This situation is more common in townships and remote-rural areas. The conditions in rural schools are appalling compared to schools located in town and or urban areas. This leads to parents taking their children to schools that have adequate infrastructure and learning equipment, thereby necessitating realignment, rationalization and redeployment. Lemon (2004) avers that parents naturally seek access for their children to what they consider to be the best schools they can afford within the bounds of cost and geographical distance. Having explored this aspect, the researcher felt that it was imperative to look at another factor that contributed immensely to the redeployment of teachers in most schools in the Alfred-Nzo Education District.



2.8 REALIGNMENT OF SCHOOLS

In West Sussex, the local education authorities highlighted a greater expenditure per pupil as a significant outcome of school reorganization (Morton & Mason, 2002). According to these authors, with a reduced number of schools, and therefore more pupils per school, it was expected that greater efficiency could be achieved for individual schools in managing and delivering the curriculum. The rationalization of resources, both human and capital, was seen as a route to higher levels of pupil achievement (Morton & Mason, 2002). They further claim that some authorities especially concerned that, particularly older pupils in 8 to 12 middle schools, were disadvantaged by not having sufficient access to specialist

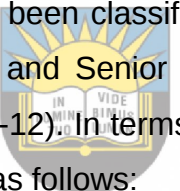
teachers and facilities. This concurs with the assertion of authorities in the Eastern Cape Provincial Department of Education when they agitated for realignment of schools.

Between the years 1998 and 2001, a decision was taken to change the schooling system in Middletown, a Midland's town in the United Kingdom, from a three-tiered to a two-tiered system of education (Lindley, 2013). The schooling system had been arranged into lower, middle and upper schools, hence, three-tier. After consultation with parents, governors and staff of the lower, middle and upper schools in Middletown, the three-tiered school structure was dismantled (Lindley, 2013). The policy was accepted in 2001 and took three years to be implemented. It is further argued that the motive behind moving from three-tier to two-tier was to establish schools that would offer the best educational opportunities for pupils and the community (Middletown County Council, 2006 b). On the other hand, the Department of Education (1992) confirmed that the decision to change the schooling system was motivated not only by raising standards but also by a financial aspect of closure of middle schools, in terms of cutting surplus of school places and expenditure. Lindley (2013) further posits that re-organization of the schooling system created some concerns to teachers, i.e. the threat of being redundant, or, more tolerably, redeployment. School redundancies and redeployment occurred in 1998 as a result of the Education Reform Act which saw the introduction of Local Management of Schools (LMS). Lindley (2013) describes change in education as a 'mantra for the modern age' which left teachers disempowered and professionally marginalized. Lindley (2013) further asserts that, from the look of things, teachers are rarely asked how they feel about issues that concern them directly, and change, where deemed to be necessary and particularly where it is imposed, has an impact upon their professional practice (Lindley, 2013).

The process meant that nineteen (19) middle schools would cease to function as middle schools in 2004; they would either close or convert to primary schools, leaving parents shocked and devastated whilst children were traumatized (Lindley, 2013). This meant that 430 teachers had to be redeployed from the middle schools yet only 363 posts were available (Lindley, 2013). Teachers from middle schools in Middletown were encouraged to apply for all suitable posts, to all alternative schools located in the same town, whether primary or secondary (Lindley, 2013). As much as Lindley's study was concentrating on

investigating compulsory redeployment and the impact on self and identity of educators, in the context of this study, redeployment does not actually talk to voluntary redeployment of educators but redeployment as a result of declining learner numbers. Lindley (2013)'s study came up with issues such as culture and identity. This was alluded to due to the fact that some redeployment candidates, teachers, had been teaching in the middle schools for the better part of their careers (Lindley, 2013).

According to the National Uniform Norms and Standards for School Infrastructure (2009), in any given country, schools may be classified in a range of ways based on the organization of the curricular, level of schooling, ownership, size and location, to mention but a few (National Uniform Norms and Standards for School Infrastructure, 2009). The notice further dictates that classifications can sometimes generate a complexity of school type. In South Africa, schools have been organized and categorized in a complex and overlapping manner. Schools have been classified into Foundation Phase (Grades 1-3), Intermediate Phase (Grades 4-6), and Senior Phase (Grades 7-9) as well as Further Education and Training (Grades 10-12). In terms of the sub-sectors, the afore-mentioned phases overlap and are organized as follows:

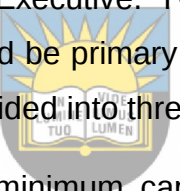
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- Primary education, offering Grades R to 7
 - General education and training or combined schools, offering Grade R to 9
 - Secondary education or combined schools, offering Grades 8-12
 - Further education and training offering Grades 10- 12

In terms of size, some schools were one teacher schools with the enrolment of 1-30 learners and classified as ultra-micro schools while others were 23 and above teacher-schools with an enrolment of 900 and above learners and classified as mega-schools (National Norms and Standards for School Infrastructure, 2009).

The multiplicity of school types within the country presents a challenge to any effort to develop National Norms and Standards that can be applied in a systemic, equitable and transparent manner; yet both quality and equity imperatives call for ensuring adequacy and equity provisioning. The range in school size also presents a serious challenge in the application of National Norms and Standards. This is due to the fact that, as much as

sufficient and equitable provisioning of small schools is not financially viable, learners who attend them have an equal right to equity of resource inputs and of potential outcomes (National Minimum Uniform Norms and Standards for School Infrastructure, 2009).

It is for the stated reasons that the Norms and Standards provided for a narrow range of school prototypes that will accommodate all existing school types against which sufficiency and equity were to be addressed. In order to allow for resource pooling and optimum resource efficiency, schools were classified into two prototypes, primary and secondary schools (Norms and Standards for School Infrastructure, 2009). This would ensure that a typical school would have a threshold of size that would make it financially viable and that assures learners equity of resource outputs. According to the Norms and Standards, all teaching spaces would be for mono-grade teaching. This would see the phasing out of multi-grade teaching, where retention of such would have to be explained to the Minister by the Provincial Member of the Executive. Two types of schools were put in place, replacing the old order: There would be primary school prototypes offering grades R to 7 and these primary schools were divided into three categories:

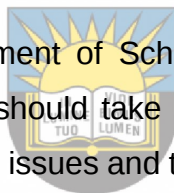
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- Small primary school with minimum capacity of 135 learners and a maximum capacity of 310 learners with one class per grade.
 - Medium primary school with a minimum capacity of 311 learners and a maximum capacity of 620 learners with two classes per grade.
 - Large primary school with a minimum capacity of 621 learners and a maximum capacity of 930 learners with three classes per grade.

The second type of schools would be secondary school prototypes offering Grades 8 to 12 and also divided into three categories:

- Small secondary school with a minimum capacity of 200 learners and a maximum of 400 with two classes per grade.
- Medium secondary with a minimum capacity of 401 learners and a maximum capacity of 600 learners and four classes per grade
- Large secondary with a minimum capacity of 601 learners and a maximum of 1000 learners with five classes per grade.

The Norms and Standards (2009) further stipulate that combined schools and intermediate schools will be phased out, and, when looking at the figures above, no school is expected to have less than 135 learners and over 1000 learners. This also implicitly means that with the phasing out of such schools, educators have to be moved to where their services will be better utilized, hence redeployment of educators. For instance, if a school has fewer than 135 learners and such a school is closed or phased out, teachers may not be retrenched as per agreement in the ELRC in 1996, but redeployed to where their services may be needed. The Norms and Standards also state that the list of subject groups and learning areas will be used in estimating the teaching and learning space requirements of the national curriculum. Contrary to this, as alluded in chapter 1, some subjects are without teachers for some time as with realignment of schools, some secondary schools had a shortage of teachers as well as textbooks for the GET phase that has been incorporated into them.

During the policy proposal (Alignment of Schools in the Eastern Cape, 2007), it was envisaged that guiding principles should take cognizance of the rights of the child and children with special needs, gender issues and the universality of human rights. These are but not limited to:



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- Access to quality education - every person has the right to education for the duration of their lifetime. The school reorganization must ensure the physical location of schools in reasonable proximity to demand, while taking account of population movement and future trends.
- Schooling norms and standards - schools and schooling be provided in accordance with national norms and standards and organized to ensure reasonable and uninterrupted access to a flow of learning from Grade R to Grade 12.
- School standards - schools will be renovated, converted, upgraded, extended or freshly constructed to the highest standards to meet planned needs of every Circuit and District.
- School transition - schools at every level should be suitable to meet demand and ensure an appropriate ratio of primary to secondary schools within a reasonable proximity to facilitate continuous access for every learner.

- Residential accommodation - some primary and secondary schools may be required to construct and provide suitable residential facilities for learners and educators (Alignment of Schools in the Eastern Cape, 2007).

The proposal further states that distance and accessibility are major challenge factors in the alignment. The distance from a combined school offering Grades 8 and 9 to the nearest secondary school may be too great to be travelled by the learner; the closest secondary school may not have the capacity to absorb Grade 8 and 9 learners from the surrounding combined schools and, lastly, road access may be such that it is difficult to reach the closest secondary school due to intervening rivers, difficult terrain, or lack of suitable access roads (Alignment of Schools in the Eastern Cape, 2007). Realignment of schools in the Eastern Cape Province of South Africa has led to closures and mergers of some schools. The following section looks into the issue of closures and mergers of the schools.

2.9 CLOSURES AND MERGERS OF SCHOOLS



Merger or consolidation is a broad term applied to describe the combining of schools or districts in an effort to create administrative efficiencies and provide improved academic and social experiences for students in sparsely-populated areas (Nitta, Holley, and Wrobel. 2010).

Nitta et al. (2010) state that proponents of mergers have seen school closures and mergers as a means of ensuring educational equity and resource efficiency. Their study indicates that consolidation affected students as well as teachers' relationships differently. As school closures and mergers also mean movement of students and teachers from their original schools to the merged or other schools, teachers who were forced to move from their original schools struggled to form relationships as did the students within the receiving schools. It is the researcher's feeling that under such conditions, quality teaching might be affected in one way or the other. In the same way, student-teacher relationships were also difficult to form (Nitta et al, 2010). Their study also unveiled that upon mergers, teachers that moved to a new school felt a little shaky with their job security. This might mean that

teaching could not be of a good quality as one may not devote one's mind hundred percent if one works under such circumstances. Such conditions might compromise teaching and learning.

Literature on school closures and mergers is in agreement that the sole purpose of school closures and mergers as is with the rationalisation and redeployment of teachers is for educational survival and economic benefit (Garraway, Langley & Chaffin, 2016; Rogers, Glenser & Meyers, 2014). Garraway et al. (2016) reason that because of declining enrolments; decreased funding and increased accountability, closure and mergers are seen as an option for improving efficiency, student achievement and economic stability (Garraway et al., 2016). Concurring with these authors, Mei, Fang and Yuanyan (2013) state that school closures and mergers help with greater efficiency and improvement in quality of education (Mei et al., 2013). Nomore (2004) also asserts that the approach allows for more effective utilization of resources, and financial savings (Bar, 1985 as cited by Garraway et.al., 2016). On the other hand, Larsen (2014) notes that on average school closings cause a negative shock to students and also have a long-run consequence in lowering both the probability of high school graduation and college attendance. A study conducted in Ontario by Basu (2007) indicates that the community of schools that were ear-marked for closure was concerned with the safety of young children, such as crossing major roads, the topography of the neighbourhoods or long distances over the winter (Basu, 2007). This may substantiate the issue of low high school graduation.

However, Nitta et. al. (2010) register that teachers and administrators in both moved and receiving schools acknowledged the benefits of mergers such as increased academic opportunities and course variety. Teachers who moved from their schools enjoyed improved working conditions as a result of mergers. For both moving and receiving schools' teachers, there was a reduced number of classes to prepare for on a daily basis. This means more time devoted to proper instruction and therefore improved teaching and learning. Rogers et al., (2014) state that school mergers also assist schools financially. From a slightly different viewpoint, they also believe that consolidation led to increased class sizes and reduced chances of one-on-one student-teacher interaction. Transport also surfaced as the one that poses some challenges with regard to extra-curricular

participation and parent participation in the educational obligations of their children (Rogers et. al., 2014).

On the other hand, Bennet-Garraway et. al. (2016), state that traditional business models are being used to address school financial concerns at the expense of the academic, career and personal or social development of children. These researchers also allude to the fact that this is occurring specifically at the expense of the potentially disadvantaged and marginalized student populations with already limited academic resources. Basu's study suggests that the community of schools destined for closure felt that closures were at the expense of children, particularly children in stressed neighbourhoods (Basu, 2007). In the same, way Bennet-Garraway et. al. (2016) note that students and communities may be losing their voices and power through the application of business practice leading to significant capital loss, and human capital loss, notably of under-represented students (Bennet-Garraway, 2016). Bennet-Garraway et. al. (2016) posit that closures, mergers and acquisitions are popular tactics used within the corporate world. This has been the observation of many commentators and teacher formations about the present Peter Morkel model of school staffing that is being used in the country, which resulted in the rationalisation and redeployment of teachers as a policy. School closures send a negative message to some students that the District or Department of Education is giving up on students from closed schools. This results in high drop-out rates in schools facing closure (Bennet-Garraway et. al., 2016). Closures and mergers are not immune from concerns from both closing and receiving schools. In the study conducted by Ayala and Galletta (2012) it was discovered that parents and teachers who were part of the closing school expressed thoughts and emotions related to the mourning of a dying school; whilst on the other hand parents, students and educators in the new school were worried that students and educators from the closing school would taint the new school (Ayala and Galletta, 2012).

Decisions to close schools are often contested by parents of children attending schools (Garraway et. al., 2016). In a Board's meeting in Ontario that was attended by delegates from the about to be closed schools, it surfaced that residents were not prepared to give up their local institutions (schools) and the corresponding resources and ties associated

with their schools and argued that their 'community identity' had been threatened (Fredua-Kwarteng, 2005). This is asserted by Torre, Gordon, Moore, and Cowhy (2015)'s report on understanding families' choices and constraints for new school enrolments when they posit that, when districts decide to close schools, they are often met with strong resistance from families, community and school staff (Torre I., 2015). This is also echoed by Scott (2014) when stating that education authorities cannot simply run schools in compliance with parental wishes. In the same way, the researcher notes that parents seemed not to understand the challenge of schools running with two or three teachers.

Rogers et al., (2014) contend that the complexity and variability of merger implementation present major challenges for the administrators and educators who must carry them out, as well as for parents and students who must adjust to new structures and procedures. As an experienced educator and a principal, the researcher knows that the education district authorities always affirm that the school closures and mergers present some challenges as other areas are hard to reach and so it would be difficult for students in such areas to get to the nearest viable schools due to inaccessibility of such areas. The 2015 research report on school closings in Chicago concerning families' choice and constraints for new schools (Torre et.al., 2015) point out that confidence in children's safety was a big concern for families, not only inside the school building but also for their children's commute to and from school. The issue of safety of children has been a matter of concern as it keeps on surfacing in almost all studies around the closure and mergers of schools.

Beuchert, Humlum, Nielsen and Smith (2016) also assert that policy-makers all over the world have imposed structural changes on schools and students to improve student achievement that include small and large changes in the students' current learning environment, ranging from major school consolidation to minor adjustments in the quantity or quality of inputs (Beuchert et al., 2016). According to Beuchert et al. (2016) economies of education, school size, in addition to pupil-teacher ratio, class size and teacher qualifications are considered as some of the many inputs in the education production function. School consolidation adversely affects students' achievement. Part of the effect seems to be caused by a short-term disruption effect (Beuchert et al., 2016). According to the authors, it is often argued that larger schools are better than small schools in terms of

teacher qualifications, specialisation and course quality. This might be true as, due to rationalization and redeployment, two or three teacher-schools may not mean that such teachers are certificated to teach all the subjects or learning areas.

Beuchert et al., (2016) further contend that the detrimental effects of school closures diminish over time. They go on to say the short-term disruption as a result of structural change exerts psychological costs on the students and teachers. However, they further note that most recent research indicates that cost effectiveness and efficiency are not a justification for larger schools. Concurring with this assertion is Kuziemko (2006) whose study evidenced that small schools are more favourable for student outcomes than large schools (Beuchert et al., 2016). This might depend on different countries' stipulated pupil-teacher ratio. For example, in Denmark, the maximum class size is 28 students (Beuchert et al., 2016) whereas in South Africa the maximum class size is 40 but due to geographical location of schools as well as the infrastructure of different schools, there are schools with more than a hundred learners in one class.

In America during President Clinton's second term of office, some organisations supported the 'Small School Initiative' as a sequel to his State of the Union Address. These organisations argued that smaller schools would foster closer ties between teachers, students and parents and also improve student achievement (Kuziemko, 2006). Kuziemko (2006) notes that Conant and his followers highlighted a variety of classes that can be offered when demand for a large group of students is pooled and the increased specialization of teachers afforded by finer division of labour. Smith and De Young (1988) arguing against small schools (Kuziemko, 2006) state that small schools are more likely to draw only from a limited geographical area and more likely to be demographically homogeneous. They further suggest that if exposure to students of different backgrounds is a function of education, school consolidation may be justified on the grounds of diversity. Furthermore, "interaction with a limited number of teachers may be stifling to students" (see Kuziemko, 2006, p. 64) whereas in larger schools where teachers are specialised to teach only one grade-level, students get a fresh start every year. Limited enrolment may hinder a student's social development whereas in larger schools with many social groups, a student may have a better chance of finding a group in which he feels comfortable

(Kuziemko, 2006). In this way learning opportunities as well may be enhanced and so is the case with learning in such schools.

“Understanding the social, political and ethical consequences that arise is fundamental to our progress as a democracy and it is imperative to delve into them in their entirety if we want to create just, equitable and civil society” (Basu, 2007, p. 5).

2.10 SUMMARY

From the foregone exploration it is evident that education is and has been evolving, more so, from the period of the 1990s to date. This is not the case only in South Africa, but also in other countries, particularly those that are still developing. All education reforms from all corners of the world are based on some sound legal and policy frameworks. This evinces the fact that in democratic countries, policy is in line with other legal principles that have to be observed and followed by those who have to implement and those who proposed in order to arrive at an amicable consensus. This is further affirmed by the Constitution of the Republic of South Africa and all legal prescripts that govern the education system in this country.

Despite this contention, this study also sought to establish if such were accomplished or had some shortfalls and, if there were shortfalls, what is the impact of such on teaching and learning as well as instructional requirements. In addition, what other framework could be proposed which would be mutually agreed upon by all stakeholders involved in education.

CHAPTER THREE

RESEARCH DESIGN AND METHODOLOGY

3.1 INTRODUCTION

This chapter departs from the literature review presented in the foregone chapter, chapter 2. It serves to explore the methodological orientation and paradigm in which the research is located. The research procedure is elucidated and its appropriateness is discussed. It outlines the research orientation, describes the case study selection process, and how access to participants was gained. It also describes how data analysis procedures were adopted in the study and how ethical considerations were maintained.

The aim of this study was to access and explore educators and SGBs' perceptions on rationalisation and redeployment in schools in the Matatiele-Maluti Education District.



3.2 RESEARCH PARADIGM

Different research paradigms reflect different ontologies, that is, different philosophical assumptions, and how the facts and principles which constitute knowledge are established and how that knowledge can be obtained (Guba & Lincoln, 1994). These researchers also claim that these paradigms also reflect different epistemological assumptions between the “knower or would be knower and what can be known” (Guba & Lincoln, 1994, p. 108). Maree (2011) explains ontology as the nature and form of reality and supports Guba and Lincoln to say epistemology looks at how one knows reality, the method of knowing the nature of reality, or how one comes to know reality by assuming the relationship between the knower and the known.

Researchers (Berg, 2012; Creswell & Walia, 2015) suggest that paradigms can be grouped into four main taxonomies, namely positivist, interpretivist, critical/transformational and pragmatic paradigms.

A paradigmatic perspective explains how the researcher views the world. When a researcher chooses a perspective in which to locate his/her study, certain assumptions and systems of meaning are chosen in favour of others (Creswell & Clark, 2011). This study seeks to understand the participants' perceptions and interpretations of the phenomenon under investigation within similar contextual circumstances.

A paradigm comprises of four elements, namely epistemology, ontology, methodology and axiology (Guba & Lincoln, 2005). For the purpose of this research, epistemology, ontology and methodology will be discussed. It is therefore important that researchers have a firm understanding of the afore-mentioned elements, because they comprise the basic assumptions, beliefs, norms and values that each paradigm holds. This, by implication, means that when researchers locate their research within a particular research paradigm, they should understand that the research will be guided by the assumptions, beliefs, norms and values of the chosen paradigm. Thus, it is important that researchers should have a clear understanding of these elements.

Epistemology of a paradigm

Epistemology is derived from the ancient Greek where the word *episteme* means knowledge. A simplified version of epistemology in research is used to describe how we come to know the truth or reality. According to Cooksey and McDonald (2011), it is about what counts as knowledge within the world. These authors postulate that epistemology is concerned with the very bases of knowledge – its nature and forms and how it can be acquired, and how it can be communicated to other human beings. Based on this view, the main focus of epistemology is on the nature of human knowledge and the comprehension that you as the researcher or knower can possibly acquire in order to extend, broaden and deepen understanding in your particular field of research. In assisting researchers to consider and understand the epistemology of their research, Kivunja and Kuyini (2017) advise that the following questions be asked: (1) Is knowledge something which can be acquired or, is it something which has to be personally experienced? (2) What is the

relationship between me, as the inquirer, and what is known? According to these authors, these questions are important as they assist the researchers to position themselves in the research context so that they can discover what else is new, given what is known. Kivunja and Kuyini (2017) explain the different forms of knowledge as follows: The epistemology of researchers who rely on data gathered from knowledgeable people, books, and leaders in organisations is grounded in authoritative knowledge. If the emphasis is on reason as the surest path to know the truth, then this approach is called rationalist epistemology or logical knowledge, whilst researchers who put emphasis on the understanding that knowledge is best derived from sense experience and demonstrable, objective facts, lean towards empirical epistemology.

Based on these views, epistemology is important as it helps you to establish the faith you put in your data, and also determines how you will go about uncovering new knowledge in the social context under investigation

Ontology of a paradigm

Scotland (2012) describes ontology as a branch of philosophy concerned with the assumptions we make in order to believe whether something makes sense or is real, or the very nature of existence or reality of being or becoming, as well as the basic categories of things that exist and their reality. Scott and Usher (2004) believe that the philosophical assumptions about the nature of reality are crucial to understanding how the researcher makes meaning of the data gathered.

Methodology of a paradigm

Methodology is a broad term used to refer to the research design, methods, approaches and procedures used in an investigation that is well-planned to find something (Creswell, 2013). In sum the methodology comprises, for example, the data gathering instruments to be used, sampling of participants, data analysis, and the logical flow of these processes, which are all part of the broad field of methodology.

This study was located within the interpretive paradigm because its contribution to this study is based on the assumption that reality is multi-layered and complex, and that a single phenomenon has multi-interpretations.

3.2.1 Interpretive paradigm

This study is located within the interpretive paradigm. According to Litchman (2010) an interpretive paradigm is part of a reality that is virtual and shaped by certain forces. Researchers who operate within this paradigm interact with participants in their natural environment. Maree (2016) posits that at the more philosophical level, this paradigm is heavily influenced by hermeneutics and phenomenology. According to Maree (2016), interpretivists believe that reality is not objectively determined but socially constructed. It is for this reason that it is assumed that by studying people in their social contexts or natural environment, there is a greater opportunity to understand the perceptions they have about their own activities. Interpretivism is a term mostly related to research methods for education in social science (Creswell, 2013). Mack (2010) avers that interpretivism is concerned with the ability of individuals constructing their own meaning, hence it is sometimes referred to as constructivism, and Maree (2016) concurs. Consistent with this view, Hussain, Elyas and Naseef (2013) posit that the interpretive research builds rich and elaborate description of the phenomena under study, and these descriptions allow the reader to gain a deep understanding of phenomena through identification and empathy. On the other hand, Cohen and Manion (2008) claim that the central endeavour in the interpretive paradigm is to understand the subjective world of human experience.

Yin (2003) supports this notion as he posits that constructivists claim that truth is relative and that it is dependent on one's perspective. Based on this view, a paradigm recognises the importance of subjective creation of meaning, but does not reject outright some notions of objectivity. Thus, the researcher looks for rich, detailed information of a qualitative nature through in-depth semi-structured interviews, observations and the interpretation of documents.

According to a number of researchers (Guba & Lincoln, 2005; Creswell, 2013; Kivunja & Kuyini, 2017), research located within the interpretive paradigm usually exhibits the following characteristics:

- The admission that the social world cannot be understood from the standpoint of the individual.
- The belief that realities are multiple and socially constructed.
- The acceptance that context is vital for knowledge and knowing.
- The acceptance that there is inevitable interaction between the researcher and his/her research participants.
- The belief that knowledge is created by the findings, can be value laden and the values need to be made explicit.
- The need to understand the individual rather than the universal laws.
- The belief that causes and effects are mutually independent.
- The belief that contextual factors need to be taken into account in any systematic pursuit of understanding.

Based on the elements of epistemology, the interpretivist paradigm guided the researcher to gather authoritative knowledge from the people who know (teachers and parents through the SGB) and who are familiar with the context and their situations pertaining to rationalisation and redeployment. The interpretive paradigm was relevant for this study because it focused on the perspectives of educators and SGBs on rationalisation and redeployment in schools. This paradigm allowed the participants to state their views which shed light on their perspectives with regards to the phenomenon under investigation. The participants were from two high schools in the Alfred-Nzo West Education District. Moreover, the interpretivist paradigm assisted the researcher to position himself in the research context and allowed him to discover what is new about rationalisation and redeployment given what is known. Mack (2010) posits that an important quality of interpretivism is that research can never be observed from outside, rather it must be observed from inside through the experience of people. It is for this reason that Maree (2016) postulates that studying people in their social context or environment provides a greater opportunity to understand the perceptions they have about their own activities, hence the use of the interpretive paradigm in this study.

3.3 RESEARCH APPROACH: QUALITATIVE

This study was qualitative in nature. Qualitative research is naturalistic (Maree, 2007). It attempts to study the everyday life of different groups of people and communities in their natural setting; it is particularly useful when studying educational settings and processes (Maree, 2007). Qualitative research involves an interpretive, naturalistic approach to its subject matter; it attempts to make sense of, or to interpret phenomena in terms of the meaning people bring to them (Denzin & Lincoln, 2003). According to Domegan and Fleming (2007, p.24), “Qualitative research aims to explore and to discover issues about the problem on hand, because very little is known about the problem”. In qualitative research, different knowledge claims, enquiry strategies, and data collection methods and analysis are employed (Creswell, 2003).

Yin (2015) postulates that qualitative methods are used across many areas of research to study the meaning of people’s lives in their real-world roles, to represent their views and perspectives, identify important contextual conditions, discover new or additional insights about existing social and behavioural concepts, and acknowledge the contribution of multiple perspectives. Thus, Gough and Deatrck (2015) describe qualitative research as a family of approaches rather than a single approach. Flanagan (2013) is of the view that this scientific method is the most powerful tool for discovering truths about the world, explore new theories and perform their empirical validation. Queiros, Faria and Almeida (2017) describe qualitative research as a method that is not concerned with numerical representativity, but with the deepening understanding of a given problem. These authors further state that the researcher is both the subject and the object of the research. Thus, the objective of the qualitative research methodology is to produce in-depth and illustrative information in order to understand the various dimensions of the problem under analysis and is, as such, concerned with the aspects of reality that cannot be quantified, as the focus thereof is on understanding and explaining of the dynamics of social relations (Queiros et al., 2017). It is in this sense that Maxwell (2013) asserts that qualitative research works with the universe of meanings, motives, aspirations, beliefs, values and

attitudes which correspond to a deeper pace of relationships, processes and phenomena that cannot be reduced to the operationalisation of variables.

Merriam (2009) notes that qualitative researchers are interested in understanding the meaning people have constructed, that is, how people make sense of their world and the experiences they have of the world. Denzin and Lincoln (2005: p.13) support this view when they say, "In an attempt to make sense of, or to interpret phenomena in terms of the meanings people bring to them, the researcher will study things in their real settings."

Nieuwenhuis (2017) and Denzin and Lincoln (2011) state that qualitative researchers can be used to collect rich data in respect of a particular phenomenon with the intention of cultivating an understanding of events being observed or studied.

A qualitative approach was chosen on the basis that the researcher will develop an understanding of the events and the individuals in their natural setting (Patton, 2015). Thus, the researcher strived to understand the meanings of participants' perspectives regarding rationalisation and redeployment in schools under the Alfred-Nzo Education District. This enabled the researcher to capture and understand the perceptions of teachers and the SGBs' views and perceptions on rationalisation and redeployment in schools. Furthermore, it also enabled the researcher to identify important contextual conditions regarding rationalisation and redeployment and the impact thereof in schools and the broader school community. In addition, qualitative research kept the researcher closer to the required data and facilitated a better understanding of rationalisation and redeployment in schools.

3.4 Research design: Case study

A research design refers to the procedures for conducting research including the when, from whom, under what conditions the data will be obtained. It is therefore the general plan, that is, how the research is set up, what happens to the subjects, and what methods of data collection are to be used (MacMillan & Schumacher, 2010).

This study employed a case study research design. A case study is a specific instance that is frequently designed to illustrate a more general principle (Cohen & Manion, 2011), while Maree, (2010, p 75), posits that a case study is a “systematic inquiry into an event or set of related events which aims to describe and explain the phenomenon of interest”. Hyett and Dickson-Swift (2014) argue that case study as a design is defined by the interest in individual cases rather than the methods of inquiry used. He further says that the selection of method is informed by researcher and case intuition and makes use of naturally occurring sources of knowledge, such as people or observations of interactions that occur in the physical space. In this study, a case study was chosen because of its use of naturally occurring sources of knowledge such as people, and observations of naturally occurring interactions in the physical space (rationalisation and redeployment).

Similarly, Leedy and Ormrod (2013) aver that a case study may be suitable for learning more about a little known or poorly understood situation. In addition, it (case study design), was chosen because one of its strengths is that it caters for multiple sources and techniques in the data collection process (Maree, 2007). This allowed the researcher to use different data gathering techniques such as document analysis in addition to interviews. This is being said on the basis that Maree states that a case study is aimed at gaining greater insight and understanding of the dynamics of a specific situation. Yin (2009, p. 27) postulates that a research design deals with a logical problem and thus proposed logical steps to answer the research question. Nieuwenhuis (2009, p. 75) further contends that a case study research is aimed at gaining greater insight and understanding of the dynamics of a specific situation. He asserts that an exploratory case study research has the advantage of generating in-depth data, which in this study, pertains to the social reality of the rationalisation and redeployment in schools. The researcher therefore used a case study of two schools to conduct in-depth semi-structured interviews with the sampled participants with the view of understanding their perceptions on rationalisation and redeployment in schools in their area, Alfred-Nzo West.

The case study design is, according to Yin (2014), an empirical inquiry that investigates a phenomenon under study and can only be studied or understood in a real-life situation. A case study design was employed in this study as it enabled the researcher to use

numerous data collection techniques as this enhanced the findings of the study (Creswell, 2013). The case study assisted the researcher to understand the perceptions of educators and SGBs on rationalisation and redeployment in detail and the participants' words are thus quoted verbatim as part of gaining answers on their perceptions.

Seen in this light, the research design involves the most effective strategy for finding the information and the most appropriate for answering the research questions. For this study, the strategy can be described as qualitative, descriptive and contextual, given Patton's (2009) contention that a qualitative research design is much more flexible in accomplishing the set goals. As explained above, the overarching design adopted for this study was therefore a qualitative one, which Nieuwenhuis (2012) describes as an approach whose epistemology foregrounds the social construction of reality. Nieuwenhuis (2012, p. 75) further asserts that a case study research is aimed at gaining greater insight and understanding of the dynamics of a specific situation.

Based on the foregoing assertion, the researcher felt that a case study design was the best approach to use for this type of exploration because the study involved a single unit, would be context bound, and would require an in-depth study of the perceptions of educators and School Governing Bodies on rationalization and redeployment in schools in the Alfred-Nzo West Education District.

The case in this study was represented by two schools in the Alfred-Nzo West Education District.

3.5 DATA COLLECTION INSTRUMENTS

3.5.1 Interviews

Researchers such as King and Horrock (2012) and Morris (2015) agree that in-depth interviews is beyond doubt the most used qualitative data collection method. Accordingly, Kvale and Brinkmann (2009) regard in-depth interviews as so ubiquitous as a method and

means of understanding the social world that social researchers refer to it as the “interview society”. The in-depth interview is similar to a conversation between two individuals discussing a topic of mutual interest, and ideally the discussion is relaxed and open (Morris, 2015). However, unlike a conversation, there is more probing by the interviewer, where the interviewees are required to elaborate on or explain further in order to get more clarity and detail on a particular topic. Interviews are based on the premise that the interviewees usually have direct experience on the topic the interviewer is interested in. This implies that the interviews give the researcher access to interviewees’ thoughts, motives, reflections, memories, experiences, understandings, interpretations and perceptions on the topic under investigation (Seidman, 2013).

3.5.2 Different approaches to interviews

Interviews can take different forms and can be structured with set questions, semi-structured or unstructured. Morris (2015) asserts that, although the different kinds of interviews are represented as ‘pure’, they often overlap.

3.5.2.1 The structured interview

Morris (2015) reasons that structured interviews are closely aligned to the survey method. However, structured interviews have set questions and the interviewer is expected to adhere to the set questions and the order of the questions. In this type of interview, the interviewer is not expected to probe answers given or digress from the set questions (Morris, 2015). Hofisi and Mango (2014) note that structured interviews have their own strengths and weaknesses. They are quick and easy to create, code, and interpret, provide reliable data and are useful for formative assessments, make provision for standardization and replication, and can allow for the efficient engagement of many respondents (Hofisi & Mango, 2014). Babbie and Mouton (2011) confirm that a major weakness of structured interviews lies in their inflexibility which leaves very little room for ‘unexpected discoveries’ while they also require substantial pre-planning as the quality of the questions determines the quality of the data.

An interview is a two-way conversation in which the interviewer asks the participants questions to collect data and to learn about the ideas, beliefs, views, opinions and behaviour of the participants (Maree, 2011). Maree further argues that the aim of qualitative interviews is to see the world through the eyes of the participants and also contends that, if used correctly, they can be a valuable source of information. Accordingly, he further differentiates between three types of interviews, which he refers to as open-ended, semi-structured and structured interviews.

On an open-ended interview, Maree (2011) posits that it takes the form of a conversation with the intention to explore with the participant her or his views, ideas, beliefs and attitudes about certain events or phenomena. This type of interview normally spreads over a period of time and consists of a series of interviews. The focus is often on participants' own perceptions of the event or phenomenon being studied. This type of interview was never considered by the researcher because of time constraints at the data collection stage considering that it involves a series of interviews.

With regards to structured interviews, questions are detailed and developed in advance. Such interviews are usually used in multiple case studies or larger sample groups to ensure consistency but if overly structured they inhibit probing (Maree, 2014).

3.5.2.2 Semi-structured interview

Semi-structured interviews are commonly used to corroborate data emerging from other data sources. The advantage this type of interview has over the former is that it seldom spans over a long period of time and usually requires participants to answer a set of predetermined questions. It allows for probing and clarification of answers.

A semi-structured schedule defines the line of inquiry. Maree (2011) also advises that the researcher must be attentive to the responses of participants so that they can identify new emerging lines of inquiry that are directly related to the phenomenon being studied, and explore, and probe. He also warns that participants need to be guided back to the focus of

the interview as it (the interview) can easily get sidetracked by trivial aspects not related to the study (Maree, 2011). For these salient reasons, semi-structure interviews were preferred to the other types of interviews.

Semi-structured interviews were employed to gather information on rationalisation and redeployment in schools. When conducting semi-structured interviews, researchers use a list of questions about fairly specific topics to be covered, which is often referred to as an interview schedule or interview guide (Babbie & Mouton, 2011). According to Keeffe, Buytaera, Mijic, Borozovic and Sinha (2016), semi-structured interviews are traditionally comprised of open-ended questions. A major strength of semi-structured interviews lies with their flexibility, giving interviewees a great deal of lee-way in how to reply (Bryman, 2004). Fallon (2008) claims that semi-structured interviews can quickly produce rich and detailed data sets, and offer an accurate assessment of the characteristics of individuals and phenomena. According to Keeffe et al. (2016), a significant advantage of semi-structured interviews is the opportunity for the previously unknown information to emerge. The fact that participants can be regarded as experts in terms of experience, new and novel information can emerge when allowed sufficient opportunities to speak freely. Rubin and Rubin (2012) state that in most cases if interviewees feel comfortable with the interviewer, they will strive to give what they consider is an accurate portrayal.

However, according to Morris (2015), there is no doubt that in every research based on semi-structured interviews, there will be interviewees who will hold back and not give a comprehensive and/or accurate account of events. Morris (2015) states that data obtained from semi-structured interviews cannot be generalized to the population, and the fact that interviews are potentially time-consuming and also an expensive method are major limitations of this method. Accessing interviewees in some cases may be difficult and involve much effort and the transcribing of the interviews can be arduous if you do it yourself and the services of professionals can be costly (Morris, 2015).

According to Schurink (1998), the advantage of this type of interview is that data are collected systematically. This also helps in comparing data from different participants. He also warns that relative little information regarding the participants' everyday world (in-depth experience) can be collected. As Maree (2007) asserts, a case study allows the

researcher to use multiple tools to gather data. The strengths and weaknesses of in-depth-semi-structured interviews are summarized in Table 3.1 below:

Table 3.1

Strengths	Weaknesses
Allows you to access rich personal data	Interviewee could be presenting inaccurate data
Allows follow-up and probing of responses and examination of complexity.	Large amount of time and effort required to set up interviews
Gives you the ability to understand an individual's context and motivations	Impossible to draw a random sample of interviewees.
Allows the interviewee to talk about what they think is important	Potentially expensive; transcribing is costly.
It is an extremely versatile method	Transcribing is time-consuming
Non-verbal information can be obtained from observing body language and intonation	

Source: Morris (2015)

Importantly, semi-structured interviews provide an effective tool for the data collection on perceptions of educators and SGBs on rationalisation and redeployment in the Alfred-Nzo West Education District of the Eastern Cape. Moreover, the dialogue in the form of semi-structured interviews and its broader relevance aimed at unearthing challenges, benefits, and implications of rationalisation and redeployment on teaching and learning were also revealed.

3.5.3 Document Reviews

When using documents as a data collection technique, the researcher has to focus on all types of written communication that may shed light on the phenomenon being studied. This may be in the form of published and unpublished documents, memoranda, reports, agendas, administrative documents, newspaper articles, etc. that are connected to the investigation (Maree, 2011). Maree further distinguishes between primary sources and secondary sources, saying that primary sources are data that are published (but it may not be in a published form, like a letter in a newspaper or company report) and which the researcher has gathered from the participants or organization directly, meaning, the original source document (Maree, 2011). On the other hand, secondary sources refer any materials (books, articles, etc.) that are based on previous published works, (Maree, 2011, p. 83). The author further warns that care should be taken to evaluate the authenticity and accuracy of the records before using them. Furthermore, in selecting documents to be included, the researcher has to verify the kind of document he/she is dealing with, whether primary or secondary, official or unofficial communication. The purpose or intent of the document, and the context in which it was produced should also be considered. Importantly, the main points or arguments put forward and their relation to the study have to be taken cognizance of (Maree, 2014).

Bowen (2009) describes documents as a form of qualitative research in which documents are interpreted by the researcher to give voice and meaning around the topic under research (Bowen, 2009). One of the reasons why the researcher chose document analysis is that it is an efficient way of gathering data due to the fact that documents are manageable and practical resources. According to O'Leary (2014), there are three primary types of documents:

- Public records: Official ongoing records of an organisation's activities, which comprises of annual reports, mission statements, policies, learner textbooks, syllabi, strategic plans, and also minute books, as well as circulars.
- Personal documents: First person accounts of an individual's actions, experiences, and beliefs. Examples may include calendars, emails, journals and newspapers.

- Physical evidence: Physical objects found within the setting (sometimes called artifacts). Examples include flyers, posters, agendas, handbooks and training manuals

For the purpose of this study, document analysis was also used as a data gathering technique. Maree (2007) posits that the researcher's literature review provides an overview of scholarship in certain disciplines through analysis of trends and debates. It describes the past and the current research on a particular topic. In collecting data, focus was on all types of written communication, for example, Departmental Circulars and Government Gazettes that shed light on rationalization and redeployment.

The purpose of this study was to explore educators and SGBs' perceptions on rationalisation and redeployment in the Alfred-Nzo West Education District, which propelled the researcher to use public records which were comprised of policies, strategic plans and personal documents such as minutes of the meetings held.

Minutes of staff-meetings pertaining to redeployment were used and assessed against the implementation process of rationalization and redeployment. Semi-structured interviews and document analysis were viewed as paramount as they could shed light on how participants felt and viewed the process of rationalization and redeployment and the implementation thereof in schools in the Alfred-Nzo West Education District.

3.5.4 Observation

The purpose of observational data is to describe the setting that was observed, the activities that took place in that setting, the people who participated in those activities, and the meanings of what was observed from the perspective of those observed (Farber, 2006). According to Bogdan and Biklen (1998) observations may include descriptions of the participants, description of the physical settings, and accounts of particular events and activities. Through this method the researcher could observe the impact of rationalisation and redeployment on classroom accommodation and the distances that learners had to cover in order to reach their respective schools. In order to gain insights into the

perceptions of educators and SGBs on rationalisation and redeployment, the researcher observed whether learners were using transport to school, whether classrooms were overcrowded and whether teaching and learning was effective or less effective.

3.6 DATA COLLECTION PROCEDURES

3.6.1 Negotiating Access

The reader is reminded of the purpose of this study, that is, to explore educators' and SGBs' views on rationalization and redeployment in schools in the Alfred-Nzo Education District.

“Successful fieldwork is usually determined by the accessibility of the setting and the researcher's ability to build up and maintain relationship with gate-keepers “(De Vos, 1998, p. 258). De Vos, citing Taylor and Bodgan (1984, p. 20), postulates that one of the most difficult and sensitive issues in qualitative research is to explain one's research procedures and interests to both subjects and gatekeepers.

A research proposal for submission to the university's Faculty of Research and Higher Degrees Committee was completed and approved. In putting together this chapter on methodology, I had ongoing discussion with my supervisor to ensure quality. De Voss, (1998) further states that identifying particulars proving that the researcher's credentials are vitally important in order to reassure that a subject is dealing with a bona fide researcher, so ethical clearance was obtained from the university's ethics committee to conduct fieldwork. The Eastern Cape Department of Education, through the District Director, was requested for permission to conduct research in schools in the Alfred-Nzo West Education District. Contact with prospective participants was sought through letters and face-to-face interactions.

Participants were also provided with a covering letter which clearly described the research and its purpose and its anticipated contribution to teaching and learning. They were also informed that they had the right to withdraw at any time if they felt uncomfortable at any

stage as participation is not compulsory, hence anonymity of subjects. They were also assured that the information provided would remain anonymous hence their names would not be divulged, but codes would be used.

3.6.2 Population

Hofstee (2006) defines population as the entire set of people, events or objects about which the researcher wants to determine characteristics, represented by parents, SMTs and teachers in these sampled schools. The population of this study were all schools, educators, School Governing Body members and principals in the Alfred Nzo District. However, on account of time constraints and costs involved, it would be impossible for the researcher to include the entire population in this study, hence sampling (Maree, 2007).



3.6.3 Sample and sampling procedure

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According to Leedy (1993), sampling refers to the selection of a sub-set of the population and must have properties that represent the population. However, there is a variety of sampling strategies as averred by Maree (2007) and Hofstee (2006) that could be employed in a qualitative study. This study employed a purposive sampling strategy wherein participants were selected according to pre-determined criteria, relevant to the research questions for the study.

A sample from which data can be collected and studied is selected on the basis that not all members of a population can be selected (Babbie & Mouton, 2005). Punch (2006) defines a sample as a smaller group which is studied, drawn from a larger population. Data is collected and analysed from a sample and inferences made back to the population. The researcher purposely selected two schools thus, purposive sampling. Purposive sampling involves selecting subjects on the basis of some characteristics they possess (Patton, 1990). Purposive sampling is justified in this study because the researcher was interested

in schools that have rationalized, and that have been affected by redeployment of teachers before. Due to the geographic location and distribution of schools, some schools are inaccessible, therefore purposive sampling came in handy for this study and the rich information that could be solicited. Leedy and Ormrod (2005) aver that qualitative researchers frequently use purposive sampling where they identify that the participants are mostly guided by their research questions and aligned objectives. Therefore, the selected schools were viewed as having in-depth data to offer.

A sample is a representative of a larger population (Maree, 2007); therefore, sampling refers to the process of selecting a portion of the population for the study. This is further asserted by Anderson (1990), when he says sampling involves taking a portion of a population, making observations, administering a questionnaire and generalizing the findings to a larger population. For this study, purposive sampling was used to select participants. White (2003) asserts that this kind of sampling refers to a situation where the researcher searches for information-rich key informants who are likely to be knowledgeable and informative about the phenomenon the researcher is investigating. Echoing this definition is Maree (2011) when defining it as simply meaning that participants are selected because of some defining characteristics that make them the holders of the data needed for the study. In his 2016 version, Maree (2016) further posits that purposive sampling decisions are not only restricted to the selection of participants but also involve the setting, incidents, events and activities to be included for data gathering. Therefore, sampling decisions are made for the explicit purpose of obtaining the richest possible source of information to answer research questions. Maree (2016) claims that samples as small as four individuals can render accurate information with high confidence if they possess a high degree of competency for the domain of inquiry in question.

For the purpose of this study, two schools in the Alfred-Nzo West Education District that were affected by the rationalisation and redeployment process were purposively selected. After selecting the two schools, one principal, one Heads of Department (HOD), two teachers, with one being a representative (site-steward) of a teacher's union, and one SGB member were selected per school to participate in this study. A total number of ten participants was selected.

The principals were selected on the basis of being managers of the schools and the front-liners in the implementation process, whilst teachers were selected based on the fact that they are the ones mostly affected during the implementation process. School Governing Body (SGB) members were selected as they represent the parent community of schools that was likely to be affected by the implementation process.

3.6.4 Discussion of the interview schedule

Barriball & White (1994) citing Denzin (1989) posit that a faulty design in the development of any research tool will distort the final results. This means that it is important in developing an interview schedule to do it with extreme caution. The development of the interview schedule had to be such that it covered all aspects of research questions directly or indirectly. The literature review also assisted much in the development stage by delineating areas of interest and relevance that should be covered by the interview. The interview schedule had about ten questions that were later piloted in order to expose it to the rigors of the field under conditions similar to those anticipated in the main study. This was done as accentuated by Barriball and White (1994) when they say this is done to assess:

- Whether respondents could and would answer the questions asked during the course of the interview;
- Whether the interview schedule would elicit the actual views of both educators and school governing bodies on rationalization and redeployment in schools; and
- Whether educators will be able to attest to issues of morale and teaching and learning *vice-vis* rationalization and redeployment in schools.

This was done to avoid issues of ambiguity that may arise from the questions delivered by the interviewer, which is common in most instances. Pilot studies provide additional knowledge that will improve the research in the sense that they provide the researcher with the ideas, approaches and clues not foreseen before the pilot study (Imenda & Muyangwa, 1996). These authors further aver and contend that a pilot study has some advantages such as being essential to reveal the possible weaknesses that may be in the

questionnaire/interview schedule; for example, vague questions, unclear directions and poor general layout (Imenda & Muyangwa, 1996). My experienced supervisors assisted most in ensuring the correctness and appropriateness of the interview plan/schedule to elicit the relevant data as per the research questions.

3.6.5 Interview setting

All interviews were conducted in the classrooms of the respondents at a mutually agreed upon convenient time. The only challenge experienced was with members of the SGB but principals of the research sites eased the challenge by allowing me to use their offices. Fraenkel, Wallen and Hyun (2012) provide a list of appropriate behaviour for interviewers when conducting interviews, including behaving naturally, listening actively and allowing respondents to talk without interruption.

All interviews were tape-recorded using a digital recorder. Permission to record the interviews had been obtained from the participants when signing consent forms distributed to potential participants at the beginning of the study. A digital recorder was used because the researcher had been informed by colleagues that it offers the good quality sound. A digital recorder is also small and less conspicuous, which makes the process of recording the interview less intrusive to the respondent. Tape-recording the interview eliminates challenges associated with note-taking during interviews, interfering with the continuity of interviews and can allow the speedy compilation of complete, accurate and objective records of interviews, providing recordings that are clear and accurately transcribed (Cohen & Manion, 2005).

The environment where interviews were carried out was very conducive as all the interviews took place after school hours when learners had gone home, which means that there was tranquility and no disturbances. The researcher had to explain to the respondents the purpose of the interview and also assure them of their anonymity as their identities would not be revealed. During the interviews, following Fraenkel et al.'s guidelines, the researcher had to behave naturally as though it was just a mere

conversation, though he had to listen attentively to each word uttered by the respondent. He had to wait until the respondent had fully responded to the question and then make a follow-up where necessary. The researcher was also cautious of asking questions in a way that implied he was judging participants' views about rationalization and redeployment in schools. This was done by delivering the question in an even tone while keeping eye contact with the respondent and avoiding anything that could suggest that I have got the expected response or not. The duration of each interview was approximately 30-45 minutes.

3.6.6 Transcribing interviews

The data collected through semi-structured interviews were manually transcribed by the researcher. Maree (2016) posits that all data collected by electronic or digital means must be transcribed and is best done by the interviewer. This will allow the researcher to include some non-verbal cues in the transcript (Maree, 2016). Data had been collected through a voice recorder as per mutual agreement between the researcher and the participants. However, McMillan and Schumacher (2014) state that the use of a tape recorder does not eliminate the need for note-taking to assist the researcher to reformulate questions and probes, and to record nonverbal communication, which facilitates data analysis. The recorded verbatim accounts of the participants were played, replayed and replayed in order to collect data that might not be captured.

3.7 TRUSTWORTHINESS

Babbie and Mouton (2008) argue that trustworthiness is concerned with compatibility between the constructed realities that exist in the minds of the respondents and those that are attributed to them. This view is supported by Maree (2007).

Maree (2016) further contends that in qualitative research the researcher is the data collecting instrument. The author further asserts that where reliability and validity are key measures in quantitative research, trustworthiness is of the utmost importance in qualitative research. Maree (2011; 2016) also states that trustworthiness also refers to credibility, applicability, dependability and confirmability as the key criteria of trustworthiness. These are said to be constructed to parallel the conventional criteria of internal and external validity, reliability and neutrality. Engaging multiple methods of data collection such as semi-structured interviews, observations and documents provided the lead to the trustworthiness of the study. Babbie and Mouton (2010) refer to trustworthiness as neutrality of findings or decisions.

De Vos (1998) is in agreement with Babbie and Mouton (2010) when he states that the fourth criterion of trustworthiness is neutrality - which refers to the degree to which the findings are a function of informants and conditions of the research and no other biases, motivation and perspectives. Three other criteria that De Vos posits in relation to trustworthiness are what he terms, truth value, which is obtained from the discovery of human experiences as they are lived and perceived by informants; consistency-whether the findings would be consistent if the inquiry were replicated with the same subjects or in similar context - consistency is concerned with the stability, consistency and equivalence in the study; and applicability- the degree to which the findings can be applied to other contexts and settings or with other groups.

Participants were provided with a draft copy of the interview transcripts to ensure that the findings were not distorted. According to Maree (2007), the use of member checking will enhance the quality of the study through verifying, confirming and validating the research findings. In the same way, De Voss (1998) says that researchers need to focus on testing their findings against various groups from which the data were drawn or persons who are familiar with the phenomenon being studied. Hence the draft copy of findings was handed to the participants. Transferability is a trustworthy concept that can be seen as external validity (Morrow, 2005; Rolfe, 2004). Therefore, participants were only selected purposively from schools that were affected by rationalisation and redeployment.

Shelton (2003) notes that in ensuring trustworthiness, researchers have to satisfy four criteria: (1) transferability where the researcher ensures thick descriptions through the use of verbatim quotations and detailed checks by a professional transcriber; (2) credibility – the researcher uses different data collection instruments, for example focus groups, interviews, and documents to triangulate data to ensure that the findings during the study are credible. Interview transcripts could also be sent back to all participants to confirm whether what was captured is what they said; (3) dependability – the researcher confirms the procedure for conducting the study and consults with the supervisor in the process; and (4) confirmability – careful sample selection through the use of purposive sampling. The researcher used observations, interviews and documents to triangulate data to ensure that the findings gathered during the study were credible (Shelton, 2003 & Maree, 2016).

In this study trustworthiness was obtained through the use of multiple perspectives in the data collection and also a manageable number of respondents was used. Maree (2007) advocates the use of at least three different sources. The piloting of the interview schedule also rendered the instrument as well as data collected credible. Member checking was also used to allow the researcher to take the information from the participants back to them for verification and confirmation. There was a need for them to check if the researcher interpreted what they said correctly. For the purpose of this study, the supervisor scrutinized the instruments to be used during the data gathering, before the actual collection of data and the pilot study to help in the validation of the instruments.

3.7.1 Pilot study

Teijlingen and Hundley (2001) define a pilot study as a small-scale preliminary study conducted before the main research in order to check the feasibility or to improve the design of the research. Maree (2007) contends that a pilot study is a good idea; it tests whether the respondents interpret the questions correctly or not and whether the response categories provided for the questions are suitable. This means that piloting the study assists in reducing the ambiguities as well as difficulties in the wording of questions. A pilot

study does not necessarily focus on data, but on matters of coverage, gaining feedback from a limited number of respondents and experts on the quality and relevancy of the questions.

Majid et al. (2017) posit that piloting for interviews is an integral aspect and is useful in the process of conducting qualitative research as it highlights the improvements needed to the major study. The importance of a pilot study has been expanded to qualitative inquiry where it is carried out as a preparation for the major study (Majid et al., 2017). This assertion is confirmed by Tashakkori and Teddlie (2003) who posit that pilot studies are procedures and preparations of full scale studies, regardless of the paradigm. The aim of the pilot study was to test the appropriateness of the questions and to provide the researcher with some suggestions on the time limit, and to guard against interviews exceeding the prescribed time limit of 40 minutes.

The interview schedule was piloted with three educators from three different schools and one parent who is a member of the SGB from a neighbouring primary school that was also affected rationalisation and redeployment. The purpose was to establish how the design of the study could be improved and to identify flaws in the measuring instrument. The sample of the pilot study had similar characteristics as the main sample to establish:

- Were the questions easy to follow?
- Was there a free flow of questions in the various sections?
- Were the questions relevant to what the research aims to accomplish?
- How long would it take to complete the interview?

Furthermore, the pilot study was conducted to establish if there were any ambiguous words, statements or phrases that could be clarified (Neuman, 2003). The pilot study assisted the researcher to improve the interview schedule. Some of the questions had to be rephrased and their sequence aligned. The only change that was picked up was the need to explain that rationalisation also talks to the realignment of the school. However, this had to be explained to participants during the interviews as this could limit the scope of data required for this study.

The interview schedule was piloted to a few teachers and parents to check the level of difficulty of the questions. It emerged from the piloting that the second-last question for teachers and principals had to be changed as they both called for a similar response. It was also evident that whenever the mentioned the word 'policy', there was a dire need for being specific about the policy under investigation. This pilot study also assisted the researcher in budgeting the expected time to be spent in each category of my actual respondents. After piloting the study, the researcher started visiting his research sites with a clear mind of what to expect.

3.7.2 Credibility

Babbie and Mouton (2006) argue that, credibility is concerned with compatibility between constructed realities that exist in the minds of respondents and those that are attributed to them. This view is supported by Maree (2007). This is also corroborated by Graneheim and Lundman (2004), when they state that credibility confirms whether or not the research findings represent plausible information drawn from the participants' original data and is a correct interpretation of the participants' original views. To ensure credibility, the researcher made sure that the participants were identified and described correctly (Holloway, 2005). The researcher constantly updated the participants on the initial findings and/or emerging concepts (Cooney, 2010). In order to ensure that the study was credible in terms of representing the views of the participants, participants were given a chance to read the draft scripts to ensure the correct version was captured of what they had shared with the researcher.

For the purpose of this study, the supervisor scrutinized the instruments to be used during data gathering before the actual collection of data and the pilot study to help in the validation of the instruments.

3.7.3 Reflexivity

Reflexivity as noted by Pylman (2013) is another attribute that the researcher should use. This is a process of critically reflecting on self as researcher, the human instrument (Denzin and Lincoln, 2008). According to Pylman (2013) reflexivity forces the researcher to come to terms with the research problem, the participants and self (the roles one plays in the research). Reinharz (1997) as cited in Denzin and Lincoln (2008) contends that in qualitative research the researcher does not only bring the self, but also creates the self in the field. She further posits that researchers bring in three categories of self into the research, namely, research-based self, brought self (the self that historically, socially and personally creates one's standpoint), and the situationally created self. Pylman (2013) reasons that all these have a bearing on how one conducts a research. Therefore, it is advisable for the researcher to interrogate each of these selves he/she brings along into research to be able to collect, analyse and present the multiple truths in qualitative research. Juup (2006) is also in agreement with the idea that reflexivity is a process of monitoring and reflecting on all aspects of a research project from the formulation of a research idea through to the presentation of findings and where this occurs, their utilisation (Jupp, 2006 as cited in Pylman, 2013).

In line with the definitions of reflexivity as alluded to above, the researcher had to strive to achieve this through self-examination, examination and re-examination of all processes throughout the research process. This helps the researchers to avoid instances where they are tempted to bring in their own biases to the research being conducted. Reflexivity assisted the researcher to constantly judge his thoughts and actions and the feedback loop played a pivotal role as it allowed the researcher to make the necessary adjustments. From the research topic through to methodology, the researcher continuously reflected on and scrutinized what he had written with the desire to improve. This also assisted him to improve his comprehension and understanding of the self and the context. Focused on the present with an eye to the future, this perspective motivated and encouraged him to change each day while conducting this study.

The reflective process involved introspection and a deep inward gaze into every interaction with participants during the interviews and was used as a tool to improve the researcher's thoughts, feelings and behaviour with the aim to enhance trustworthiness of the research findings.

3.8 ETHICAL CONSIDERATIONS

Wassenaar (2006) avers that one of the most salient aims of research ethics is to protect the welfare of research participants. In undertaking this research, the philosophical principles guiding ethical research were observed as much as was practical. Wassenaar (2006) highlights four fundamental principles applicable to research, viz: autonomy and respect for dignity of persons, nonmaleficence, beneficence and justice. Other seasoned researchers' views such as the researcher's supervisor, were used to guide his ethical conduct during the study processes. Some of Wassenaar's (2006) principles are discussed below and blended with other renowned researchers' principles.



3.8.1 Autonomy and dignity for persons

The purpose of the study has to be stated to the participants and they must be informed of their right to participate and to withdraw at any time during the study (Schumacher & McMillan, 1993). Likewise, participants were informed about the purpose of the study. This was to ensure that participation is voluntary.

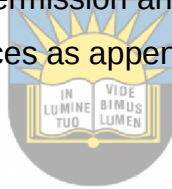
3.8.2 Nonmaleficence

Wassenaar (2006) states that this principle supplements the principle of autonomy and requires the researcher to ensure that no harm befalls the research participants as a direct

or indirect consequence of the research. In this study participants' anonymity was ensured by not divulging or assigning any response to the names of participants or the actual names of their schools.

3.8.3 Permission

White (2005) states that ethics are generally considered to deal with beliefs about what is right or wrong, proper or improper, good or bad; therefore, the researcher wrote a letter to the District Office, care of the District Director, asking for permission to conduct research in sampled schools. This was done through a letter from the University of Fort Hare, Faculty of Education, having recognized the proposed study. Letters to school managers were written timeously so as to obtain permission and time for interviews and other processes. This can be viewed in the appendices as appendix D at the back of this study.



3.8.4 Confidentiality

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Confidentiality indicates how information will be handled; therefore, information was handled as per agreement and private information was protected. Cohen and Manion (2005) view confidentiality as an agreement between persons that limit other's access to information. Participants were advised not to write their names on the questionnaires and no information would ever be linked to any participant's name. They were given code numbers in order to respect their privacy. Participants were assured that data collected would be available only to the researcher and that interviews were for academic purposes only.

3.8.5 Informed consent

One of the requirements for research on human beings is that the researcher must obtain informed consent from the respondents (de Vos, Strydom, Fouche & Delport, 2002; Wassenaar, 2006). This practice calls for researchers to obtain such a consent from parents/guardians if participants are minors. Wassenaar (2006) posits that this principle finds expression in most requirements for voluntary informed consent by all research participants. Participants were given consent forms and informed that, that was a way of confirming that participation was voluntary. Consent forms also contained a section that was clear about voluntary participation and benefits. A copy of the consent form can be viewed in the appendices as appendix E at the back of this study. Verbal consent was also tape recorded as agreed with the participants when signing the consent forms. The written consent forms were left with the participants in order for them to acquaint themselves with the contents and pose questions when they did not understand some points.

Obtaining informed consent implies that adequate information on the goals of investigation and procedures will be followed during the investigation. The possible advantages and disadvantages and dangers to which participants may be exposed, and the credibility of the researcher, are communicated to the potential subjects or their legal representatives (Babbie, 1998). A general idea of what the study was all about and a brief description of what specific activities their participation would involve, was communicated to the participants in order for them to make a reasonable, informed judgment on whether to participate or not. Thereafter, consent forms were prepared and given to participants in order for them to sign (Leedy & Ormrod, 2005). This enabled participants to bring forth their knowledge and experiences.

3.9 DATA ANALYSIS

The task of data analysis can be described as a process of bringing order, structure and interpretation to a massive amount of data in search of general statements about relationships and underlying themes that build a grounded theory (Maree, 2007). This is echoed by De Vos, Strydom, Fouche and Delport (2013) when they describe data analysis as a process of bringing together order, structure and meaning to the collected data. This called for recording of data from participants and field notes for comparison so that member checking could be useful when the need arose. The next aspect to consider is the unit of analysis. In line with the interpretive approach chosen for this study, the research questions have driven the data analysis by providing the units of analysis, namely, exploring the perceptions of educators and SGBs on rationalisation and redeployment.

The data collected were transcribed and analysed qualitatively. According to Johnson and Christensen (2012), this process involves the analysis of text from interviews or field notes transcripts. Data analysis requires reduction of voluminous amounts of information from data collected. For this to be achieved, the researcher had to develop a coding scheme that contained phrases, transitions and words linked to the research questions. Coding schemes can be divided into two broad forms: (1) frequency counts (key words, phrases, word pairs) and (2) keyword-in-context analysis (Franklin, 2012). The coding scheme operationalise codes by establishing categories that are relevant and valid. Marsh and White (2006) posit that a coding scheme should have clear definitions, easy-to-follow instructions and unambiguous examples. The coding scheme acted as an analytic framework to make sense of the open-ended responses (Franklin, 2012) and to keep a record of the rules followed in the identification of the codes.

The final step in the analysis of the data was to make sense of the themes and categories identified by exploring the properties and dimensions of the categories and to present the researcher's reconstructed meanings to the reader. The form and the extent of reporting depend on the goal of the research (Patton, 2002). The data analysis process involved adopted a thematic approach following the transcription of the interviews and observational data from educators, SGBs and the research sites. The message content of the interaction

patterns and conversations from individual interviews and observations were first coded before being categorized into code families or clusters according to themes emerging from the research questions posed to the participants (Nieuwenhuis, 2012). In this study, the following codes were used: P was used to refer to Principals, UR was used to refer to Union Representatives, T referred to teachers and HOD referred to Heads of Department while SGB referred to members of the School Governing Body. In order to code all the field notes using the procedures highlighted by Strauss and Corbin (2010), the researcher had to adopt a programme of reading and re-reading the participants' interview transcripts as well as the data reduction process (Miles & Huberman, 2002).

Forming categories or code families required the researcher be on the lookout for patterns of similarities and differences (Strauss & Corbin, 2010). The categories were extrapolated from the data gathered through individual interviews and observations. After revising, restructuring and sub-dividing the data, comparisons and contrasts were made as part and parcel of the data analysis process. These were then reduced into discernible superordinate themes for further analysis, presentation and discussion (Nieuwenhuis, 2012). It is in this sense that, in order to consolidate the findings, the data analysis process included the use of verbatim statements from the interviews, which Nieuwenhuis (2012) claims edify and enhance the trustworthiness of the research results.

3.10 SUMMARY

This chapter has touched on aspects of methodology which encompass research paradigm, research approach and research design. It also addressed issues of population and sampling as well as interviews, different types of interviews and how they were piloted. This chapter also pointed out how the interview schedule was discussed with the supervisor to check if questions are relevant to solicit the required data or if they need to be adjusted. The interview setting has also been clearly explained and the data transcription procedure has been explained. A brief account of the type of documents that were used to capture the necessary data relevant to the study has been given as well as

the observations which gave the researcher an opportunity to triangulate as a way of ascertaining if what transpired from the interviews correlates with what has been observed. An account of how the data were analysed has been succinctly explained as well as two most salient aspects in research, trustworthiness and credibility, coupled with ethical considerations.



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CHAPTER 4

DATA PRESENTATION AND ANALYSIS

4.1 INTRODUCTION

The previous chapter discussed the methodological aspects of this study. The present chapter focusses on the presentation and analysis of data collected. This study sought to explore the perceptions of the educators and the School Governing Bodies (SGBs) about rationalisation and redeployment in the Alfred-Nzo West Education District. Data were collected through semi-structured interviews, documents and the researcher's observation in the visited research sites.



In this chapter the views of educators and school governing body members are presented and analysed in order to find answers to the main research question and related sub-research questions as outlined in chapter 1. The main research question guiding this study was as follows: **What are educators and the SGBs' perceptions on rationalisation and redeployment in schools?** The main research question was operationalised by the following sub-research questions:

How do educators and schools benefit from rationalisation and redeployment policy? What challenges do educators and SGBs encounter with the implementation of the policy on rationalisation and redeployment in the selected schools? What is the interface between the instructional requirements and rationalisation and redeployment? What are the implications for policy change? and What framework can be suggested for policy change?

4.2 OVERVIEW OF PARTICIPANT SELECTION

Two schools in the Alfred Nzo West Education District that were affected by the rationalisation and redeployment process were purposively selected. After selecting the two schools, one Head of Department (HOD), the principal, two teachers, with one being a representative (site-steward) of a teacher union, and one SGB member per school were selected to participate in this study which brought the total number of participants to ten. However, an educator from one site withdrew on the date of the interview, leaving a total of nine (9) participants.

4.2.1 Background information of participants



The principal of school A had been serving in that school for the past 28 years. Many changes in the education circle had been taking place in his presence whilst the principal of school B had two years in the site though he had been a principal of another school for a period of 22 years. This is an indication that the two principals had the requisite experience needed for this study. Teachers on the other hand also boasted a substantive number of years in the teaching fraternity. Their years of experience varied between 23 and 30 years. There is nothing to specify about the SGB as their term is always three years as per the South African Schools Act (SASA, 84 of 1996). Much as the interviews went well, but there were some challenges as some had to postpone the scheduled time due to their commitments ranging between academic and personal matters.

4.2.2 Background information of the schools

A brief description of the two selected schools who participated in the study is as follows:

SCHOOL A

This school is located in the deep rural areas where there are mostly Junior Secondary Schools that had been converted into primary schools as a sequel to the rationalisation of schools in the province. It was established around 1924 by the Catholics and has an enrolment of 630 learners and 18 teachers, and has a boarding facility that accommodates 580 learners, both males and females. Many years ago, the school used to be administered in the now KwaZulu-Natal (KZN) starting from the present Grade 8 to 12. With time the school was placed under the current Eastern Cape Province and it ran from Grade 10 to 12. It boasts a total of 18 classrooms that are well-looked after in terms of renovations by the Catholics. Of the 18 teachers at the school, three of them are employed by the SGB and fifteen are state employed. Some learners walk to school and there are some who benefit from the scholar transport. In 2014 the school had to add Grades 8 and 9 as a sequel to the rationalisation of schools programme in the province.



SCHOOL B

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This is another school found in deep rural areas. It has an enrolment of 854 learners yet it used to have an enrolment of about 580 learners before it was rationalised to accommodate both Grades 8 and 9. There are 28 state-paid teachers and one SGB- paid teacher to have a staff component of 29. There are 12 classrooms and two prefabricated ones to put the number of classrooms at 14. Only Grade 12 learners stay in the old classrooms as their boarding facility, for they were lucky not to have them demolished after it was renovated in 2010. Some learners walk to school whilst many enjoy scholar transport, which seemed not reliable.

4.3 QUALITATIVE DATA ANALYSIS

Qualitative data analysis is primarily an inductive process of organizing data into categories and identifying patterns and the relationships among the categories (MacMillan & Schumacher, 2014). These researchers contend that in qualitative studies there is a great amount of data to be analysed, summarised and interpreted. Maree (2016) argues that qualitative data analysis is based on interpretative philosophy aimed at examining meaningful and symbolic content of qualitative data (Maree, 2016). In agreement with MacMillan and Schumacher (2014) Maree (2016) postulates that it is best achieved through a process of inductive analysis of qualitative data where the main purpose is to allow research findings to emerge from the frequent, dominant or significant themes inherent in raw data, without the restraints imposed by a more structured theoretical orientation (Maree, 2016)



4.4 PRESENTATION AND ANALYSIS OF DATA

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Data collected through semi-structured interviews were analysed thematically as detailed in the previous chapter. The following themes and sub-themes emerged from the data and were analysed follows.

Theme 1: BENEFITS OF RATIONALISATION AND REDEPOLYMENT

Sub-theme 1.1: Addressing inequalities

UR 2 made reference to the benefits of the closure and merger of schools when he stated:

“There are schools with very few learners, as few as twenty but they are still allowed to operate with at least a teacher or two until it becomes clear to everyone that such schools should be closed and merged with other small schools to make one viable school in order for learners to enjoy their right to education”.

In the statement above, it appeared that he was aware that there was a need for the closures and mergers of small, non-viable schools. According to him the closure and merger of schools could contribute towards the improvement of the standard and quality of education to which each and every learner is entitled.

An inference could be made that for a long time, parents were aware that there had been something wrong with the way the South African education system had been deliberately designed to advantage some social groups more than others. It became evident that all social groups were put on par as far as resource distribution is concerned to enhance quality teaching and learning.

In reference to this theme the participants shared their experiences on some benefits of rationalisation and redeployment. Participants confirmed by stating the following:

P 1 *“...for receiving schools it does as they will always have enough teachers with each subject having a specialist whereas for schools that lose teachers, learners are disadvantaged...”*

P 2 *“It involves adding teachers where there is a need and also taking away where they are in excess...”*

UR 2 *“I think it does, considering that learners will have teachers in front of them where there had been few teachers compared to the school enrolment...”*

T 1 *“If a school is set to receive educators, it benefits...when Grade 8 and 9 get to high school while doing Grade 8, they see how things are done in order for them to succeed in their studies as everyone is obliged to be serious...”*

HOD 1: *“Well, for those that have enough teachers as per their enrolment, they benefit...”*

From the statements above, it was apparent that the policy on rationalisation and redeployment had some benefits as participants indicated that it actually balanced the learner-teacher ratio in schools. From these participants it could be deduced that schools with very high learner enrolments were afforded an opportunity to get more teachers which resulted in the allocation of teachers for each and every class as well as lower numbers per class. The policy benefited learners as alluded to by T 1 who was vigilant enough to note that the time learners spend at high school as per the rationalisation process afforded them a chance to copy and emulate their senior school-mates on what was expected of high school learners in terms of being serious with their studies.

Participants were also aware of the past dispensation where there were inequalities and imbalances in the education system of our country. SGB 2 claimed, for example, that there were inequalities and imbalances in the teacher distribution during the apartheid era. His views were captured as follows:

“It is an educational policy that was meant to address inequalities and imbalances that were imposed by the pre-democratic South Africa...”

The following extract also attests to the fact that parents had high hopes and embraced the policy as they felt that it could be of assistance to their children. Testimony to this claim is imbued in the following extract:

SGB 2 *“We were happy to have our children at high school for longer period...”*

The above statement was an indication that the time spent by learners and educators in a particular phase or school had some benefits for the learners which could be a mutual benefit. This is believed to come from a perspective that the two parties could end up knowing the strengths and weaknesses of each other, which allowed for a better understanding on how to deal with matters of mutual benefit, teaching and learning.

This was also echoed by UR 2 when he said:

“Learners are exposed to their teachers for a longer period when they get to high school, five years compared to previously where they would be with the teacher for three years”.

The above-claim was an indication that it benefits learners to be with the same teacher for a reasonable time as teachers get to know the learners well and were able to assist them through quality teaching and learning, resulting in improved learning outcomes.

Sub-theme 1.2: Alternative to retrenchments

From the interviews with the union representatives it became apparent that redeployment benefits teachers as one reasoned as follows:

UR2 *“On the other hand, it looks fair, it is not like when they had to be declared additional to the schools and be retrenched. It is better to be redeployed than being retrenched because that guarantees you job security”.*

From the afore-statement, we learn that redeployment was an alternative to retrenchment, which could have been very disastrous and stressing on teachers declared additional to the school’s staff allocation. This was also accentuated by T 1 when giving a succinct version of her understanding of the policy. This is what she said:

“So, in order to avoid retrenchments, the issue of redeployment came to the fore...”

It could be inferred that redeployment had some benefits as it saved most teachers from retrenchments and therefore saving their jobs. The benefits ranged from balancing the learner to teacher ratio; period spent with the same teachers at high school; equitable resource distribution; avoiding fruitless expenditure on teacher salaries; ensuring job security for the teachers and proper channelling of learners through informed subject choices.

Sub-theme 1.3: Cost effectiveness for the Department of Education

Participants also spoke about savings for the Department of Education. This assertion linked rationalisation and redeployment to savings on salary:

UR 1 *“As for redeployment, it is just a way of saving on teachers’ salary...”*

According to this participant, it appears that rationalisation and redeployment was introduced with the sole aim to reduce the number of teachers per school, thus saving money for the Department of Education.

Theme 2: CHALLENGES IN RELATION TO RATIONALISATION AND REDEPLOYMENT



Sub-theme 2.1 Lack of interactive consultation and communication

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The lack of interactive participation, consultation and communication resulted in the under-representation and even non-representation of important stakeholders and powerful role-players (School Governing Bodies; parents and teachers). This left a sense of these role-players being powerless in the implementation of redeployment and rationalisation resolutions.

Communication is a very important tool to advance knowledge and understanding among people in order for them to influence one another with full understanding and embrace the intentions and the origin of policies. Lack of communication was cited as a challenge with regards to policy implementation. Participants shared their experiences on how the policy was communicated to them, which indicated some points of concern. Participants confirmed this by stating the following:

SGB 2 *“The departmental officials arrive at us being in a hurry and provide us with less (little) information. This relates to the time they spend explaining and at the end, to us this rationalisation is less meaningful”.*

P 2 *“Through rush-rush meetings instead of workshops”.*

P 2 *“...stakeholders were not all consulted; I mean parents, traditional leaders and community-based structures”.*

SGB 2 *“Parents lack thorough information and often complain to us that our schools do not have enough number of teachers...”*

HOD 2 *“...most parents knew and still know very little about it...”*

The excerpts above bear testimony of the lack of understanding amongst parents and various other stakeholders. The above excerpts are an indication that some of the stakeholders, parents in particular, were not conversant with the policy and there was a feeling that they deserve to know about everything that relates to their children's education with regards to policies to be implemented. Phrases like “... *rush-rush meetings...*” and “*officials arrive at us being in a hurry...*” succinctly captured the sentiments of these participants regarding the lack of time spent to explain this policy and the implementation thereof. These views confirmed the lack of language and actions that promoted and encouraged discourse between all relevant school stakeholders and the Department of Education. Workshops were not held and there were no discussions on management plans.

Principals also shared their sentiments with regards to their understanding or lack of understanding of the redeployment and rationalisation policy. The excerpts below capture their views succinctly:

P 1 *“There was never a stage where anyone could boldly say he/she understands how well it would be followed”.*

P 2 *“It was transparent but not easy to implement...”*

From the above assertions we could infer that the policy on redeployment and rationalisation was not properly communicated, and even not well understood by some

school principals. An inference that could be made was that, this lack of understanding had inevitably led to the apparent misinterpretation of the policy by school principals, which hampered its smooth implementation. Furthermore, principals positioned themselves as facilitators between the Department of Education and teachers. It looked like the principal was multi-tasking when the policy was implemented as he/she had to play contradicting roles and was always caught up in a dilemma. On the one hand he/she had to see to it that the policy was implemented by virtue of being the accounting officer and on the other hand he/she had to see to it that there was a sufficient number of teachers at his/her school as he/she also accounts for the results of his/her school-

Participants also spoke about how members of the School Governing Body were side-lined by not being formally informed. This extract attests to this view:

UR 1 *“...there is no correspondence regarding the process to the School Governing Bodies and its effectiveness and implications towards teaching and learning for their children”.*

This sentiment foregrounds the lack of recognition of School Governing Bodies. According to this participant the School Governing Bodies, as statutory bodies in the education system, should be recognized and accordingly informed and consulted on all matters pertaining to the schools under their jurisdiction, and, most importantly, matters that were affecting the education of children in that particular school. Disseminating a sensitive policy like this one needs sufficient time to be explained for stakeholders to be fully convinced and to develop a sense of ownership and the zeal to defend and embrace it. The following statement bears testimony to this claim:

SGB 1 *“We were just informed by the principal that this is what the Department is intending to do”.*

This statement further underlined the lack of debate and consultation between SGBs and the Department of Education as school principals fulfilled the roles of ‘mediators’ between SGBs and the Department of Education. The minute books in both schools also confirmed that the SGBs and teachers were informed by their respective principals about the rationalisation and redeployment policy and procedure.

Sub-theme 2.2: Bureaucratic administration

Furthermore, the issue of control and bureaucratic decision-making is highlighted when these participants say:

UR 1 *"...they complain about the top-down approach being used instead of teachers in general being hands-on and have a greater input on policies affecting them".*

HOD 2 *"We were just told that this is to happen".*

UR 1 *"...their presence may not sway the decisions that have already been taken by those with the powers or authority".*

UR 1 *"...they were just told and theirs was just to listen as their inputs were never considered".*



The excerpts above bear testimony of the participants' declaration of the top-down approach that was followed with the implementation of the redeployment and rationalisation policy. This further implied the lack of consultation and how this policy, which could rightly be regarded as unilateral, was basically imposed on schools without much or any input from their side. The issue of control and lack of democracy is reminiscent of a notion that represents non-interactive language, non-consultation and consensus. An inference that could be made from the above statements was that the lack of proper consultation, dialogue and mutual decision-making is that teachers were regarded as an ordinary labour force for whom it was compulsory to follow departmental rules and regulations. Thus, teachers were treated as mere workers who just have to follow instructions.

It is in this sense that HOD 1 emphasised the importance of consultation when stating that:

"The Department should listen to teachers, the implementers of the policy on how best it (the policy) could be implemented.....A bottom-up approach is necessary for the policy to be effective, teachers' voices must be given an ear..."

From the foregone presentation there was a view that the way in which the policy was formulated was a top-down approach because policy-makers never considered the views of the policy implementers and other affected parties. The following claims are examples of how participants make reference to the top-down approach:

UR 1 *“Yes, I agree...their presence may not sway decisions that have already been taken by those with powers or authority”.*

HOD 1 *“...So...it was imposed, the two are just the same as they were imposed”.*

From these participants it could be learnt that they claimed that teachers could have contributed to the smooth implementation of the policy if they had been given an opportunity to make their own representation with regard to the policy formulation. What HOD 2 presented was an indication that the SMTs and teachers were just given an instruction to implement the policy.

UR 1 *“...policy-makers must not rely on what the unions say because teachers on the ground are the frontline implementers of these policies...”*

This view pointed to the fact that there was no direct consultation and interaction between teachers and that the Department of Education who only consulted and negotiated the redeployment process with teacher unions who in turn communicated it to their members (teachers). SGB 1 concurred with this view when she said:

“Department should consult...and implement the recommendations that surface after consultation...”

From SGB 1's statement it could be deduced that there was no proper consultation by the Department of Education about this policy. The views of these participants were reminiscent of the notion of managerialism adopted by the Department of Education to control teachers.

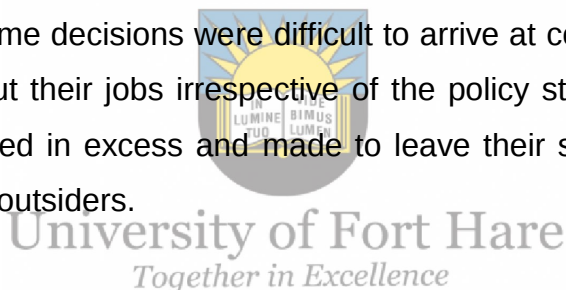
Sub-theme 2.3: Fear and uncertainty amongst teachers

The redeployment and rationalization plan had evoked fear and concerns among educators. This was evident during staff meetings when the atmosphere became tense and increasingly difficult to identify the curriculum needs of the school. This fear was evident during staff meetings where teachers refrained from identifying these needs as this would mean declaring oneself in excess in the school. This view was confirmed by P 1 and P2:

“...teachers tend to keep quiet in meetings called for this exercise on redeployment. Every teacher wants to be immune from the process”. (P 1)

“Teachers are uncertain about their future...” (P 2)

This indicates that some decisions were difficult to arrive at considering that the teachers were concerned about their jobs irrespective of the policy stipulations. Teachers feared they would be declared in excess and made to leave their school once the posts were permanently filled by outsiders.



Sub-theme 2.4: Strained relationships and low teacher morale

The policy also created animosity between the SMT and the teachers, as this resulted in work overload for teachers who are not redeployed. This assertion was held by UR 1 when he said:

UR 1 “...resistance from other teachers to be on the list of additional or excess educators at the school which ends up creating animosity between the SMT and post level one educators...”

UR 1: “People sometimes feel victimised by their principals but also some principals target teachers...”

A vague inference that could be made from the above extracts was that teachers who were declared in excess in a particular school would always believe that the principal or SMT used the redeployment and rationalisation policy to target them. Moreover, this tendency ultimately created feelings of animosity between the management and the teachers, which would inevitably lead to low teacher morale.

Changing conditions locally and globally requires teachers to be competent, professional and pro-active in order to meet the growing learner demands and to function effectively. However, from these extracts we learn that the managerial control of teachers by their respective principals during the redeployment process did not only dampen teacher morale, but also had the potential to lead to polarised relationships between the principal, school management teams and fellow teachers.

Sub-theme 2.5: Fragmented family and collegial relationships



With regard to this theme it transpired from the interviews with participants that rationalisation and redeployment leads to strained family relationships. This is how one participant aired his views:

UR 2 “Some complain about being placed far from their families because they have to relocate and in the process family relations end up getting strained...”

The views expressed above were confirmed by HOD 2 when she said:

“Teachers are forced to move to places that are far away from their homes and...they are separated from their families which is everybody’s wish to be nearer their families, so the policy does not consider such at all.

Considering the above views, it could be clearly seen that rationalisation and redeployment appeared to be a real concern for the family fragmentation that could also lead to fragmentation in society. Thus, redeployment was not a pleasant experience for teachers as it caused havoc and fragmented family units and unhappiness as there would be

disruptions to the families of redeployed teachers. Moving to a new school impacted negatively on teachers' personal and family life in a sense that, when redeployed, they were then separated from their families, colleagues and friends.

From these quotes we also learnt that changes due to redeployment influence teachers' working conditions and even their identities, as they were uprooted from their learners, classes, colleagues, and familiar school environment to make a new start in the school to which they had been redeployed.

P 1 *"Yeah, well they had some concerns about their children having to move from their schools to other villages for schooling..."*

HOD 2 *"If children are taken away from their parents and have to walk long distances...it is already traumatising them".*

What we learn from P 1 is that parents did not feel good when their children left the village and move to other villages. It could be inferred that because of the village life which is full of bullying, especially on children who are from outside a particular village, no parent wanted his/her child to be a victim of such. This was fuelled by the fact that children walked to schools as expounded in the theme dealing with the challenges.

As alluded to above that parents would always expect the best for their children, they were also prepared to go an extra-mile to see to it that they satisfy their children's needs and welfare. Despite not being financially stable, they sacrificed as children would not be happy to stay home when their peers attend school. This was evident in UR 2's assertion below:

"...but rationalisation has caused them to fork-out huge amounts of money to pay for transport..."

Parents paid extra fees to make sure that these children attended school and bought new uniform for them. This did not go down well with the parents as one of them had the following sentiments to share:

SGB 1 *"It affected us a great deal, emotionally and financially..."*

It is believed that life is never easy when there is not enough money for every household and having to part with the little that people have, which they get through social grants, makes life very difficult in every family. The relations could be strained if a child may have to stop going to school due to financial constraints. An emphasis could be felt when this participant said: *“...as I do not work but want children to be educated”*.

The above extracts however contradict what emerged from the documents perused as it transpired that there was very little resistance and or argument about payment of extra-teachers through fundraising in the parents' meetings. In school A, the majority of learners came from the working class and parents agreed to the proposed amount to pay additional teachers without any difficulty. It was in school B where parents complained about the proposed amount as they did not work.

Sub-theme 2.6: Violation of school acts and constitutional rights of learners



Some schools have been dubbed 'no-fee' which means that the parent community of those schools do not have to pay any monies to the school but the policy has made it impractical to observe the status of such schools to the letter. Such schools end up charging fees in an attempt to recruit teachers to supplement the shortage of teachers due to redeployment. What transpired during the interviews was that the law was flexed in an attempt to overcome this challenge brought about by redeployment of teachers from their schools. This is what one participant had to share:

P 2 *“Our school for instance is a ‘no-fee’ school but we are obliged to charge fees...”*

Based on the view of this participant, schools were compelled to violate school policies and government legislation which clearly made provision for fee paying and no-fee paying schools. This participant confessed how laws were broken by individual schools in their quest to realize their learners' goals and aspirations. This was also observed in the SGB minute books of both schools, where an agreement was made to charge fees in order to pay stipend to the SGB-paid teachers. This also proved that such schools did not have any

option but to charge fees for learners in order to fill vacancies left by the redeployment process. In this respect, one principal stated as follows:

P 2 *“Mind you, in the SGB, the parent component dominates and would always insist that if a parent does not pay, his/her child’s report should be withheld...”*

This was a clear indication of the desperation among School Governing Body members and an effort to support teaching personnel in their quest to provide quality teaching to their learners. They realized that teaching and learning is of fundamental value and were willing to take this risk in order to facilitate teaching and learning. However, this also pointed to failure on the side of the Department of Education and the government in general which are responsible for making education available to all children.

Sub-theme 2.7: Political correctness



Participants also held the view that it was time to bring about change in the education system in South Africa after the country had been ushered into democracy for the first time after decades of oppression of the majority by a minority group, and everyone had high hopes that the present government would come up with policies that are biased towards the previously disadvantaged groups and no one would dare oppose such changes. P1 and SGB 2 made reference to this weakness:

P1 *“...at that time the spirit of change was still held in high esteem, so no one wanted to appear antagonistic to the policies of the ruling party and not after liberation”.*

SGB 2 *“It is an educational policy that was meant to address inequalities and imbalances that were imposed by the pre-democratic South Africa...”*

From the above excerpt it could be inferred that some of the policies that were introduced after the liberation were embraced for the sake of transformation and allegiance to the ruling party. There was also a feeling that decisions on policy matters needed to be based on practical facts on the ground depending on what transpires after consultation.

Theme 3: INSTRUCTIONAL REQUIREMENTS IN RELATION TO RATIONALISATION AND REDEPLOYMENT

Sub-theme 3.1: Compromised quality teaching and learning

In reference to this theme, participants shared their views and experiences on the avalanche of challenges which were viewed as major drawbacks due to the negative impact thereof on quality teaching and learning. Challenges which were associated with the redeployment and rationalisation process ranged from overcrowded classrooms, lack of Human resources, lack of physical resources, unqualified teachers, lack of transport, and language barriers.



Sub-theme 3.2: Lack of transport as barrier to learning

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The policy had led to some schools being closed and some merged with other small schools in order to make them viable. As much as this appeared to be a noble idea in order to enhance teaching and learning as well as equitable resource distribution, participants held a different view.

The following are examples of how participants made reference to school closures and mergers:

UR 1: *“Think of those little souls at the Foundation Phase who have to be ferried to other schools away from their community just because their school has been closed. They have to wake up early from such a tender age, [and] this results to kids who are made to feel that having to go to school is another form of punishment”.*

P 2 *“At least if rationalisation was implemented as advocated, that is merging small schools, it would be much better but the only challenge would be for the young ones, Foundation Phase to leave their village to another which might be far”.*

From the above information it could be deduced that the closures and mergers of schools had brought about strain in young children who were in the lower grades, who had to wake up early to leave their villages in order to get to the nearest schools. This also had financial implications for parents in order to provide for those young ones to get to school. This was concurred by SGB 1 and 2 below:

SGB 1 *“At the present moment I am paying R300.00 a month for a child who is commuting to and from school every day yet he was attending at that school...”*

SGB 2 *“Some schools have been closed and the young ones also have to get to school, as to how, the parents have to see the how part of it”.*

According to these participants the closure and merger of schools impacted negatively on the education of these young children as they had to leave their homes and villages very early in the morning in order to get to the nearest school.

UR 2: *“The reason I say this is that when these schools that are said not to be viable these days, there was a reason to establish them, let alone that they have few learners and those reasons are still in existence I believe. They still cross rivers, walk through the forests where they might be raped or even worse, be killed.”*

According to this participant it did not matter whether schools were closed or merged, as he made reference to the challenges that learners faced. In particular, he made reference to the dangers that the learners faced on a daily basis when they had to cross flooding rivers on rainy days and walk through forests. This statement also alluded to the lack of scholar transport for those learners.

There seemed to be an agreement as well as contradiction within the union representatives around the issue of school closures and mergers. This became evident when one compares the views of UR 1 and 2, as UR 2 had some points that appeared to convince that closures and mergers were the route to go in order for quality teaching and learning

to take place. In order to support his view UR 1 made the following comment about closures and mergers:

UR 1 *“That there are schools that mushroomed later to curb this long journey to school and this [policy] does not erase the fact that it had been so before”.*

According to this union representative one of the reasons for the establishment of schools in each and every village was to make schooling accessible to each and every learner in that particular village, thus curbing the long distances that learners had to walk to school in the absence of scholar transport. This participant made vague reference to the Department of Education which was then reneging on that decision, the closure and merger of these small schools.

The following are examples of how participants made reference to challenges with scholar transport:

SGB 1 *“...there was a promise of scholar transport which we are still awaiting to get...”*

SGB 2 *“Transport is a major challenge in our case as there are fewer high schools than primary schools”.*


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SGB 2's statement indicated that learners travelled long distances on foot to their respective high schools despite having been promised scholar transport. The participants below concur with the view stated above when making reference to the negative impact that the lack of transport had on learners.

UR 2 *“The long distance they walk to school leads to high drop-out rate...”*

HOD 2 *“When getting to school, they are already tired and can hardly concentrate during teaching and learning”. “...high drop-out rate...” and “...can hardly concentrate ...”*

HOD 2 made reference to the weakness of teaching and learning in those schools. An inference that could be made from this excerpt was the fact learners were not able to attend school due to the long distances in the absence of transport. Furthermore, learners could leave their homes for school in the morning, but would play truant and never reach school. The fact that learners could hardly concentrate became a serious barrier to learning which

made it extremely difficult for teachers to teach under those circumstances. Thus, was a serious drawback for the quality of teaching and learning in those schools. An inference could be made that as much as the policy could be good, there were areas that still needed to be attended to in order to reduce or even eliminate those challenges. Furthermore, that was a clear indication that there was poor or even no proper planning on the side of the Department of Education as witnessed by lack of transport for learners to the new schools that had been rationalized. What UR 2 stated above, can be confirmed by what the researcher observed when driving to the research site where he met learners going home on foot due to persistent breakdown of their bus. This was an indication of how difficult it was for those learners.

The above quotes are indicative of the barriers that lack of transport placed on many learners. This did not only cause learners to drop out from schools, but also posed a serious safety risk to the learners. Furthermore, many learners found it hard to focus and concentrate on their school work due to tiredness.



Sub-theme 3.3: Lack of physical resources

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For schools receiving learners from other schools, whether through closures or mergers, accommodation became a challenge as there were insufficient classrooms, even where there were sufficient classrooms the challenge that was often reported was related to insufficient furniture and textbooks. A verbatim account of participants was captured as follows:

SGB 1 “Well, as for accommodation to these schools that have received learners from the Junior Secondary Schools, one can just say it leaves much to be desired as schools do not have sufficient furniture and textbooks for learners”.

HOD 1 “Not having proper accommodation is also one of the hindrances towards claiming any benefit for them as most schools in the rural areas do not have sufficient classrooms

to accommodate these learners and are forced to be taught outside even when weather conditions are not that good for such...”

From the above presentations an inference could be made that the rationalisation policy was implemented without having ascertained whether alternative schools had the necessary resources or not. Accommodation in the form of classrooms as well as furniture and textbooks were viewed as the basics if quality teaching and learning was to be realized in every school. This could also mean that the Department of Education in the Province implemented the policy prematurely hence the impasse between parents and the Department of Education. Depriving learners attending these schools of basic necessities like classrooms, textbooks and furniture was not only a violation of their Constitutional Rights, but also undermined the role of education in promoting equality and social justice.

Promoting equality, quality and social justice is a major role of education. However, based on the above extracts, it became clear that the redeployment process resulted in serious infringements of learners' rights to quality education. “...*not having proper accommodation*” bears testimony to how this right to quality education was being violated. The statement made by SGB 1 above, confirms the researcher's observation during the fieldwork where in school B, it was observed that in the newly added grades, 8 and 9, learners were sitting in 'threes' and shared textbooks. This confirmed lack of furniture and teaching and learning material. It could be inferred that quality teaching and learning did not take place effectively.

Sub-theme 3.4: Language barriers

Participants also shared their concerns about teaching and learning in the primary schools where the language of instruction in Foundation Phase (FP) is the home language of the learners. There was a perception that teaching and learning was not taken seriously by the redeployment policy, because there were instances where learners with different home languages were combined to be taught by one teacher.

The following extract sheds light on the situation in FP with regard to teaching and learning:

T 1 “...think of Foundation Phase combined and taught by the same teacher, they are in different cognitive levels... In our area, we have both Xhosa and Sotho only to find out that they are either taught by someone who does not know one of the two languages”.

Based on the above statement, this teacher was compelled to teach both languages groups despite the fact that he/she could be comfortable with only one of the home languages. It was even worse in situations where there was multi-grade teaching, hence the view that this policy compromised quality teaching and learning in the Foundation Phase and, moreover, it was a serious violation of the Language in Education Policy, the South African Schools Act and Curriculum and Assessment Policy Statement (CAPS). It could also be inferred that right from the Foundation Phase some learners lacked proper foundation which could work against them as they progressed academically.

The language issue also emerged as a challenge in one of the research sites where it was discovered that there were more than three languages offered viz. English Home Language, English First Additional Language, IsiXhosa Home Language, SeSotho Home Language, Afrikaans Home Language and Afrikaans First Additional Language. This meant that there was a need for a language specialist for each in that site, but the formula used to determine the number of posts per institution would talk to the number of learners.

Sub-theme 3.5: Lack of human resources

Participants also shared their concerns on the lack of human resources. Moving learners from one school to another caused an influx of learners in that particular school. This led to a severe shortage of human resource in the recipient schools that would then have to make or do with existing human resources. As HOD 2 confessed:

“They do not bring children to our schools with the human resource; they use us who are already here...” She further goes on to say *“...they are not catered for because they have no teachers”*.

An inference that could be made from this statement was that learners who were 'transferred' to their 'new' schools were "...not catered for ..." at all in terms of teaching and learning. Teachers viewed that as an additional workload, but what was mostly disturbing was the fact that according to this teacher, these learners were simply being ignored in terms of teaching and curriculum coverage.

Lack of human resources coupled with high learner numbers inevitably give rise to overcrowded classrooms, which is a huge source of frustration and stress among teachers. In this respect one UR 1 and one HOD 2 stated as follows:

UR 1 *"...they complain about overcrowding...; they complain about overload which ends up stressing teachers"*

HOD 2 *"It leads to teachers being overloaded...and no individual attention to the learners"*.

These quotes did not only point to teacher frustration levels due overfilled classrooms, but also to their frustrations due to being unable to give individual attention to learners, which seriously undermines the quality of teaching and learning. "...overcrowding" and "...no individual attention to learners" bears testimony of their frustrations.

Participants indicated that teachers in the mid-fifties choose to resign more than being redeployed to places that are far from their residential areas. This view was confirmed when UR 1 says:

"Some teachers choose to resign other than moving to schools far away from their area, especially those that are about to reach an age within which they can retire, that is around fifty-five years..."

It can be seen from this statement that the Department of Education and schools in general were losing teachers with many years of experience and expertise. The fear of being declared in excess and possibly redeployed to areas far from their homes caused anxiety and uncertainty, hence resignation was contemplated. This also placed an additional burden in terms of workload on the remaining teachers.

The following extract sheds light on the situation in FP with regard to teaching and learning:

T 1 *“Home language is considered a failing subject. A learner may get all level 7 in other subjects, but if that learner fails the Home Language, he/she is as good as having achieved nothing in the grade”.*

It could be inferred that in the Foundation Phase, the language of teaching and learning was compromised. Multi-grade teaching also compromises a proper foundation, in the Foundation Phase, due to redeployment. This was necessitated by the fact that some primary schools had four or fewer educators with seven grades, hence the content gap when they got to higher grades. This was concurred by P 1 when he said:

P 1 *“...as they arrive here it is easy to tell that there is content gap...and we cannot blame them because they were taught by three teachers in all subjects...”*

Echoing this is UR 1 when he was responding to the question relating to children’s right to basic education. This is what he said:

“...in the case of primary schools how do you expect four teachers to be able to teach all the learning areas?”



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These participants emphasized the importance of individual attention to learners, which was highly unlikely in these schools, due a severe shortage of teachers and extremely high learner numbers.

Participants also held a view that quality teaching and learning seemed to be compromised by the policy where teachers on the redeployment list moved at any time when a vacancy was found, leaving schools at which they had been teaching in the lurch. The following excerpt confirms this perception:

UR 2 *“The momentum of teaching and learning gets frustrated by the policy...it is much better for one to finish the work that one started than moving a person before completing his/her task”.*

This gives an impression that teachers were placed in other schools without considering that they had started their work in a particular school. Learners were just left without a

teacher at any time. An inference that could be made was that, schools from where teachers were redeployed were now left with a smaller workforce, placing a huge responsibility on the remaining teachers which impacts negatively on the entire functioning of the school. This led to some subjects being taught by teachers who were not specialists, just to have a teacher in front of the learners. It could be inferred that the policy intentions and implementation in practice were not compatible. Testimony to this was borne by the following extracts from the interviews:

P 1 *“...learners are disadvantaged and have to contend with teachers that are not qualified to teach certain subjects”.*

SGB 2 *“In most cases learners take a long time not being taught after the affected teacher has left due to redeployment. On the other hand, learners take time to get used to their new teachers...”*

HOD 1 *“...teachers are also forced to teach subjects they are not trained and licensed to teach, which is frustrating indeed”.*



The above excerpts were an indication that the policy did not take into consideration subject offerings at schools which then made it difficult to ascertain whether quality teaching and learning for improved learner outcomes prevailed. The issue of teachers teaching subjects they were not trained to teach was also confirmed by UR 2 as he said:

“...that is a challenge because one cannot be confident enough in the subject he/she last did in Grade 12 ...schools with such teachers do not perform to their potential”.

Evidence in this section revealed how lack of subject specialization could compromise the quality of teaching in Grade 12. This was a vague inference that teachers who were in most instances redeployed to schools, lack the requisite subject experience and/or specialization in the subjects to be taught. This did not only seriously compromise the quality of teaching and learning, but was also a source of great frustration for teachers who were unable to perform to their full potential. This is corroborated by what emerged from the staff minute book where teachers made some proposals to appeal the PPN on the basis of some subjects that could end up being taught by unqualified personnel to teach

them. This was indicative of how difficult it was for the remaining teachers after redeployment.

Theme 4: MANAGEMENT OF RATIONALISATION AND RATIONALISATION AT SCHOOL LEVEL

According to the South African Schools Act (84 of 1996), the principal is an accounting officer, is responsible for overseeing the implementation of all policies.

Sub-theme 4.1: The role of principals in relation to redeployment and rationalisation



Participants were also concerned about the manner in which this process was being handled by school principals. The following extracts reflected the views of participants:

HOD 1: *"...the principal chairs the meeting and lead the discussions. Secondly he is the man in charge of seeing to it that there is proper teaching and learning in the school..."*

UR 1: *"...some principals do not want to follow the correct procedures for their personal interests...some principals target teachers who they feel or judge as troublesome in one way or the other".*

This view was confirmed by SGB 2 when he says:

"...so, the principal is the one who is in charge of everyone at school, so we always suspect that he might use his powers to chase away people from the school".

From these extracts we learn that participants were concerned about the manner in which this process was being handled as it seemed that some school principals were engaging in improper behaviour in deciding which teachers should be declared in excess. It seemed as if some school principals used the redeployment process to 'punish' teachers who they

considered as 'troublemakers'. The excerpt "...the principal might use his powers to chase away people from the school" bears testimony of the participant's declaration of the abuse of power by some principals. HOD 1 made reference to the fact that some school principals were failing to follow the correct procedures for their "...own personal interest..." Thus, an inference that could be made is that, these principals were secretly working to ensure that the services of their 'favourites' and 'buddies' were retained. In one hand, the staff minute books in the research sites showed how difficult it was for the principals executing their functions of allocating subjects to various available teachers. On the other, the members of the SGB looked up to the principal to find solutions to teacher shortages. The principal had to urge teachers to handle certain subjects for which they were not qualified to teach until the issue of shortage of qualified teachers was presented to the parents in a meeting. This was an indication that the principals had to stretch themselves for teaching and learning to go on smoothly in their schools.



4.5 Summary

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In this chapter the researcher presented, analysed and discussed the data that were collected mainly from observations, documents and semi-structured interviews. The researcher also discussed major findings of the study against local and international literature. Data presentation and analysis were done in line with the sub-research questions that guided the study. In the next chapter, the researcher concludes the study by making a summary of the findings, proposing a policy framework for policy change, concluding and giving recommendations.

CHAPTER 5

DISCUSSION OF FINDINGS, CONCLUSIONS AND RECOMMENDATIONS

5.1 INTRODUCTION

The preceding chapter presented the data and the findings of the study. This chapter discusses the findings, makes recommendations and concludes the study. The research questions presented in chapters 1 and 4 provide a point of reference for the discussion. The discussion of the findings is hinged on the literature reviewed in chapter 2. The researcher used the critical social sciences theory and the complexity theory as the overarching frameworks for discussing the findings. These frameworks formed the cornerstone for exploring educators and the School Governing Bodies' perceptions on rationalisation and redeployment in the Alfred-Nzo West Education District of the Eastern Cape.



5.1.1 Theoretical frameworks

5.1.1.1 The critical social sciences theory

The idea of a critical sciences theory was developed by Habermas (1979) as a way of overcoming limitations. It offers a framework of thinking which emanates from problems of everyday life, and is constructed with mechanisms of solving them. In short, the empowerment and emancipation of humanity lies at the heart of the critical theory.

5.1.1.2 The complexity theory

Complexity theory offers a lens through which to find a better understanding of what it takes to initiate and sustain a systemic change. This theory offers a dynamic and system-wide perspective on how sustainable change, characterized by new properties and behaviours in the education system, emerges from the interactions of a myriad of factors in the economic, political, social and cultural environment in which education is situated.

5.2 PHILOPHY OF RATIONALISATION AND REDEPLOYMENT

The philosophy underpinning rationalisation and redeployment is based on the principle of application of uniform teacher-pupil ratio in all the schools which was initially conceived as a way of equity both within and between the provinces. Furthermore, the principles outlined in the ELRC serve as a basis for the philosophical grounding of this process as follows:

- Making changes in an organisation in order to increase efficiency and equity in education.
- Transfer of educators from over-staffed schools to under-staffed schools.

5.3 RESTATING THE PROBLEM STATEMENT

Despite this noble intention of the Department of Education to bring about change, rationalisation and redeployment has brought some challenges (Chudnovsky, 1998). The researcher's observation as a teacher was that, rationalisation and redeployment in schools was inseparable from school closures as rationalisation could bring about closures which then led to redeployment of the teaching corps of the affected schools. Rationalization and redeployment was introduced, yet no arrangements had been made

for extra classrooms and teachers where needed. A critical shortage of teachers, books, chairs and classrooms were experienced by the schools that were rationalized. Some schools that had been affected had been left with three teachers from Grades 1 to 7 due to redeployment. A worrying fact was that there was no proper teaching as some teachers complained about high workloads and some resigned as a result of the policy. The Member of the Executive Committee (MEC) stated that by the end of 2016, there were 219 one-teacher schools and one could not hope to have quality education under such conditions (Daily Dispatch, 2017). Such schools were good candidates for closure and teachers would be move to where their services could be needed.

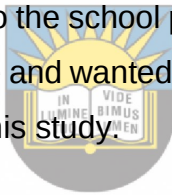
The above discourse concurs with Molale (2004) who stated that policy-makers and politicians are focused on the desired outcome of educational change but they neglect the contextual factors that influence implementation. This is further augmented by the research conducted in the Western Cape by Boughardt (2011), where teachers confirmed that the workloads of those who remain at school are increased by rightsizing. This means that the work of the person who has been redeployed has to be distributed amongst the remaining teachers on that post level at the school (Boughardt, 2011). Soudien (2001) concurs with this view and asserts that many teachers surveyed in the Western Cape perceived the introduction of rationalisation as just another burden they were forced to carry. Restructuring of these schools by no means automatically implied reform; on the contrary, it meant further hardship.

As a principal in one of the affected schools, the researcher observed that this process had a negative impact for learners who have to walk long distances to and from schools, as no provision of scholar transport was made to the new schools. Distances between rural schools and places of residence form a significance barrier to physical access to education (KwaZulu-Natal, 2014). This view is affirmed by Mulkeen and Chen (2008) when stating that the distance to school is a major barrier to children's attendance. Mulkeen and Chen (2008) further claim that the school enrollment fell rapidly as the distance to schools increased. The researcher observed as a teacher and principal of a school, that learners who travelled long distances on foot tend to fall by the way side as the year progressed. Furthermore, learners in some rationalized schools had to write the May/June

examinations in 2014 without being taught in some subjects and learning areas while there was inadequate space for them to write their examinations.

According to Boughardt (2011) change associated with staff deployment can have a negative impact on the morale and motivation of teachers. Some teachers opted for resignation rather than being redeployed to other schools far from where they used to teach (Chisholm, 2005). My experience as a principal is that, amongst teachers who resigned due to the policy, are principals of schools who decided to leave the profession when their schools' post allocations declined. Xaba (2003) also noted that the movement of teachers during the academic year as a result of redeployment disrupts the quality of school cohesion and performance.

Most recently, in 2015, when a teacher was redeployed from one of the schools around Alfred-Nzo West Education District, parents and learners caused unrest by locking gates, thereby denying anyone access into the school premises. Teachers who were not affected by redeployment did not feel secure and wanted to leave the school through transfers. This raised the research questions for this study.



5.3.1 Research objectives

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The objectives were:

- To determine how schools and educators benefit from rationalisation and redeployment.
- To explore the challenges that educators and SGBs encounter with the implementation of the policy on rationalisation and redeployment.
- To determine the interface between the instructional requirements, rationalisation and redeployment.
- To determine the implications for policy change.
- To suggest a framework for policy change.

5.4 DISCUSSION OF THE FINDINGS

Finding 1: Rationalisation and redeployment had some benefits

It appeared that rationalisation and redeployment was introduced with the sole aim to reduce the number of teachers per school, thus saving money for the Department of Education. The policy on rationalisation and redeployment was also seen as beneficial as it balances the learner-teacher ratio in schools, thus addressing inequalities. Valley and Spreen (2005) argue that education reform is situated within a policy frame that privileges cost recovery and fiscal austerity measures linked to self-imposed structural adjustment programmes. These authors also claim that the original intention to ensure equity in the schooling system through redistribution measures has been largely subverted by imperatives of budgetary constraints linked to macro-economic policies. Rationalisation and redeployment has, however, saved some teachers from retrenchments which could have led to an increase in the rate of unemployment.



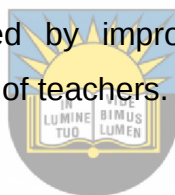
Finding 2: Rationalisation and redeployment had its own challenges

It also emerged there were challenges associated with the policy on rationalisation and redeployment. Below are some challenges were found to be inherent with the policy:

No interactive communication and consultation with stakeholders

Lack of communication was cited as a challenge with regard to policy implementation. The policy on redeployment was not properly communicated, and not even well understood by some principals. This lack of understanding had inevitably led to the apparent misinterpretation of the policy by some of the principals which hampered the

smooth implementation of the policy. Smit (2001) avers that policy-makers at national level produce policies, and although teacher formations may be present at that policy level, schools and teachers remain in the background and their voices are seldom heard. According to the Advisory, Consultation and Arbitration Services (2005), consultation does not mean that employees' views always have to be acted on since there may be reasonable practical reasons for not doing so. Lindley (2013) states that senior administration and the ministry make decisions that directly affect the work of teachers, yet with little inclusion of and the input from teachers. It also transpired from the participants of this study that the decisions were being made by individuals who had little or no classroom experience, who were far removed from recognizing what was in the best interests of teachers and students in a classroom setting. This is more of advice to those who are in power in order for them to improve their practice. According to Netshilaphala (2015), the former SG in the Eastern Cape, difficulties in the implementation of the redeployment policy were caused by improper communication which led to the demoralisation and disillusionment of teachers.



Bureaucratic administration

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The bureaucratic administration further implied the lack of consultation and how this policy could rightly be regarded as unilateral, as it was basically imposed on school principals without much or any input from their side. The issue of control and lack of democracy is reminiscent of a notion that represents non-interactive language, non-consultation and consensus. The way in which the policy was formulated was a top-down approach because policy-makers never considered the views of the policy implementers and other affected parties/stakeholders. Lindley (2013) supports this notion when he says that low morale, dissatisfaction and reduced commitment are the end result of imposed change. Similarly, Kuddo (2009) posits that reforms that were aimed at promoting a more efficient public funding and reforming financing and management of educational institutions went through a highly political and social process, and the risk of success or failure had more to do with politics and policy formulation than with the technical aspects of implementation.

Smit (2001) avers that policy-makers at national level produce policies, and although teacher formations may be present at that policy level, schools and teachers remaining in the background and their voices are seldom heard. In Circular Number 23 of 2015, Netshilaphala, who was the Superintendent-General in the Eastern Cape, acceded to the fact that the difficulties experienced with regards to rationalisation and redeployment were caused by improper communication which had led to demoralisation and disillusionment among teachers. In addition, Molale (2004) states that policy-makers and politicians focus on the desired outcomes of educational change but neglect the contextual factors that influence implementation (cf. the statement of the problem). Smit (2001) also postulates that teachers who are key role players in the implementation phase, the salient voices in the process, are more often than not ignored and often discounted in this process of educational change. The Advisory, Consultation and Arbitration Services (2005) states that where the views and ideas of employees help to improve a decision, due credit and recognition should be given. This implies that where the employees' views are rejected, the reason for doing so should be carefully explained (Advisory, Conciliation and Arbitration Services, 2005). Implicitly, for the researcher, this was painting a picture that the current policy-makers did not take note of this and, in policy formulation and implementation, this might cause serious damage.

Fear and uncertainty amongst teachers

The rationalisation and redeployment plan had evoked fear and concerns among educators. Moreover, there appeared to be a real concern amongst teachers for their personal safety in the event of being redeployed into areas of violence. Nitta et al.'s (2010) study revealed that when schools were merged, student-teacher relationships were difficult to be formed. Teachers who were forced to move to a new school struggled to form relationships as did the students within the receiving schools. This also caused them to be a little shaky with their job security. Sharp-Paul (2000) sheds light on how difficult it is to adjust to a new environment. The author further explains that adjustment is dependent and closely related to people's experiences, environmental factors and

personal strengths. The author further posits that human beings adjust their behaviours according to standards laid down by the society or the community. Implicitly, that meant that a teacher from one community could find it very difficult to adjust in a different community, hence, the fear and uncertainty. Poor work adjustment leads to worker inefficiency, discontentment and resentment, and a serious maladjusted behaviour (Sharp-Paul, 2000). On the other hand, that could possibly cause a feeling of frustration to the redeployed teacher. Lindley (2013) also posits that teachers' perception of experiencing change in school culture can differ and contextual factors can influence them and their practice. Kuddo (2009) also states that in Armenia teachers with a pedagogical background who were deemed redundant did not wish to work in any field except teaching.

Political correctness



Some of the policies that were introduced after the liberation were embraced for the sake of transformation and allegiance to the ruling party. There was a feeling that decisions on policy matters needed to be based on practical facts on the ground depending on what transpires after consultation. This is supported by a study conducted by Bharath (2004) when stating that new policy directives in education were initiated as part of transformation processes. Similarly, the Employment Protection that was developed in order to entrench the Policy and Procedure for Managing Change in 2010 in England and Wales is clear in saying that reviewing staff levels requires considerably more than just complying with the basics of statutory employment law. Govender (1998) asserts that teacher unions have influenced education policy and social change throughout their history. The author further claims that South African teacher unions currently enjoy a closer relationship with the government than they did before 1994. That is what entrenched preoccupation with political correctness.

Violation of children's right to education

The Constitution of the Republic of South Africa, section 29, states that all children have a right to basic education, while section 28 (2) emphasizes that “the child’s best interests are of paramount importance in every matter concerning the child and thus entrenches the paramount principle as a right in itself”. However, the policy on rationalisation seemed to violate this right. When schools rationalised, no proper foundation was ever laid as most learners were left without the necessary transport to ferry them to the nearest schools, as rationalisation saw their schools being closed and promised transport. On arrival in those new schools, they were tired and could hardly concentrate during teaching and learning. Some even crossed rivers and went through the bushes which implicitly meant that their safety was compromised. Mulkeen and Chen (2008) confirm that distance to schools is a major barrier to children’s attendance. The draft report on rationalisation of schools in KwaZulu-Natal (2014) also supports this confirmation when it states that distances between rural schools and places of residence form a significance barrier to physical access to education. This was further confirmed by the researcher’s observation during data collection where learners were travelling long distances on foot to and from school. There was also insufficient furniture hence the researcher felt that their right to education was infringed.

Finding 3: Rationalisation and redeployment had a negative impact on teaching and learning

Compromised quality teaching and learning

There was an avalanche of challenges which were viewed as a major drawback due to the negative impact thereof on the quality teaching and learning. Challenges of the rationalisation and redeployment process ranged from overcrowded classrooms to lack

of physical infrastructure, unqualified teachers, lack of transport and language barriers. Peske and Haycock (2006) reason that in the United States, learners in low-income and minority areas enter school without knowledge and skills that they need to succeed. The unfortunate part was that, rather than organising the educational system to pair those learners with expert teachers, who could help them to catch up with their more advantaged peers, the opposite was done. Those learners were assigned to teachers with less experience, less educated and less skilled than those who taught other children. What is worth noting is that, learners in high poverty and high minority secondary schools were more likely to be taught by 'out-of-field teachers, that is, teachers without a major or a minor subject they teach.

Constrained relationships and low teacher morale



The policy also created animosity between the principal and the teachers, as it resulted in work overload for teachers who were not redeployed. In addition to that, that tendency ultimately created a feeling of animosity between the management and the teachers, which in turn led to low teacher morale. The issue of low teacher morale is supported by Bharath's (2004) study where principals who were participants in his study confirmed that redeployment undermined the teachers' morale. This actually transpired according to Bharath's participant who explained that redeployment results in work overload for teachers who remained after redeployment. According to Bharath (2004), when educators were redeployed, the remaining teachers had to deal with larger classes, tightly packed timetables and carry an increased workload. Participants also shared the view that, as a result of redeployment, where they had to leave places where they were able to be with their families at all times, family relations had been strained. It is the researcher's view that when family relations get strained, production of whatever nature gets strained as well. The report of the *Daily Dispatch* (2017) wherein the then MEC for Education, Mr Makuphula, claimed that in instances where there were only a few teachers at a school, proper teaching and learning could hardly be realised. Bharath (2004) and Douglas (2005) are in agreement that reduction in staff members results in multiple-grade teaching which

might lower teachers' morale, probably because of no one-on-one learner attention, and the escalating bad outcomes. Low results tend to lead to low teacher morale.

The principals' role in relation to rationalisation and redeployment

There was a concern about the manner in which this process was being handled, as it seemed that some principals were engaged in improper behaviour in deciding which educators should be declared in excess. This is what the critical social sciences theory is trying to explain as Habermas (1979) claims that this theory seeks to offer individuals an awareness of how their aims and purposes may have become distorted and specify how these can be eradicated. On the other hand, Amagoh (2008) confirms that complexity theory focuses on how parts at the micro-level in a complex system affect the emerging behaviours and the overall outcomes at the macro-level. In Circular Number 23 of 2015, the then SG in the Eastern Cape conceded that the absence of the voices of the members of the SGBs, SMTs and the learners about the impact of implementation or lack thereof of these policies in schools presents some challenges. According to Resolution 6 of 1998, it is incumbent upon the principal to convene staff meetings that relate to post provisioning and the subsequent effects on their schools. According to Thedi (2004), it is in these meetings where educators felt insecure. Bharath (2004) posits that many principals misinterpret the policy principles and use the process as a way to 'get rid' of teachers believed to be trouble-makers. This then translated to victimization of targeted teachers. Lock and Lummis (2014) opine that the role of the principal is changing due to increased demands external to the school and is placing leaders more as administrative agents of the government and taking them away from crucial roles at the school and drivers of education leadership within the school. This showed how the policy intentions were sometimes hijacked at the implementation stage.

5.4.1 Implications of the study

This study determined the perceptions of educators and SGBs on rationalisation and redeployment in the Alfred-Nzo West Education District. The findings of the study revealed that the lack of communication was not well received by parents, teachers and the School Governing Body members due to lack of consultation and understanding of the policy. This had some implications for the policy on rationalisation and redeployment. The results of this study showed that the unilateral approach followed by the Department of Education was not a useful approach for the effective implementation of the policy.

The implication of this study is that continued use of the policy in its present form results in fear, low teacher morale, frustration and animosity between teachers and the management. The findings, therefore, suggested that there was a need for the Department of Education not to infer that parents, teachers and the School Governing Bodies would always understand and implement the policies without any challenges. This resulted in negativity and resistance from teachers who were deemed to be surplus to the school's staff establishment, hence the policy was once put on hold and nothing done about those teachers who resisted when redeployed to schools that needed their services.

The findings also revealed that the bureaucratic approach that was used in relation to redeployment had some flaws as, in a democratic dispensation, people deserve to be put on board with regard to matters of interest that also have a bearing on them. That the members of the community and other stakeholders, such as parents, were never consulted about redeployment was a matter of great concern. That caused confusion amongst parents on the role played by the principal when teachers were redeployed from one school to the other. On the other hand, when teachers were identified as additional to their staff establishment, they lost confidence resulting in low self-esteem as they would always think that they were not the best teachers among the cohort of teachers in that particular school. This was further exacerbated by anxiety and fear of the cultural change as a result of changing one's work place. This ultimately led to a series of resignations by the most experienced teachers. By implication, it meant that schools/teachers should be afforded opportunities to make representation in order for the policy to have a positive

impact and smooth implementation, as decisions could be based on practical implementation strategies on the ground. The principal had to make sure that quality teaching and learning took place in his/her school whereas he/she also had to make sure that policies were implemented even if it meant disadvantaging learners in his/her school. This implies that the role of the principal was a very difficult one under such conditions. That became worse when chairing those meetings wherein the identification process took place, as teachers simply kept quiet instead of being part of the deliberation as is required by the policy. There was always pressure on principals which might also lead to stress and anxiety due to compliance issues.

The findings also revealed the lack of planning by the Department of Education which was indicated by lack of classroom accommodation, furniture, and transport for the learners from their original to the new schools and the subsequent increase to the drop-out rate due to the distance travelled by learners. The safety of learners was compromised as they crossed rivers that were difficult to cross in summer. For schools to rationalise properly and efficiently, the Department could have conducted the feasibility study of classroom accommodation in the schools destined to accept learners so as to ease the challenge of overcrowding and the availability of furniture. The findings also indicated that in rationalised school's preference was given to the FET Phase at the expense of newly added GET Phase classes, probably due to shortage of human resources. This implied that quality teaching and learning was compromised.

The findings also revealed that some policies might have been introduced in order to bring about a political change in education which had seen the black children not receiving what could be described as 'quality' education. The implication is that some of the policies, including rationalisation and redeployment, were hastily introduced without giving them deeper thought. This had led to some salient avenues not being explored. This implied that the issue of languages was never thought to be as deep as it transpired from the study. It transpired that redeployment had led to Foundation Phase learners who were not well grounded when they happened to be taught by a teacher who was only able to teach one of the home languages and had a challenge with the second language. This

could have been picked up earlier if there had been proper consultation and the views of other stakeholders solicited before the policy was implemented.

The findings also revealed that the policy on rationalisation and redeployment also created a very difficult situation for schools as some schools were running with fewer teachers, which also contributed to a high teacher workload. High workload leads to stress among teachers and therefore poor performance. By implication, it meant that some learners were promoted to the next grades without having been properly and adequately prepared for such grades.

Furthermore, the findings also revealed rationalisation and redeployment had some benefits for the state. For the DoE, arising from the reduction in the number of teachers per school, the money which would have been used to pay these educators could be used for other education related matters, and for schools with high enrolment, the implication is that they would receive more educators to ease the burden of the high workload.



5.4.2 Suggested framework for policy change

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It became evident that the rationalisation and redeployment process has not achieved all its objectives due to various challenges inherent to the procedure and processes with the implementation thereof. The following framework is proposed in order to eliminate the challenges that were inherent with the rationalisation and redeployment processes.

- Broader consultation with all stakeholders, i.e, parents; SGBs; community structures; educators; students and teacher organisations.
- A bottom-up approach as opposed to the top-down approach.
- Arrangement transport and infrastructural requirements such as furniture; classroom accommodation; teaching and learning material, should form part of the discussions on rationalisation and redeployment.
- Subject choices offered in schools should be considered before teachers are redeployed or schools are merged with other schools.

- Within an education system that often uses a language as the medium of instruction that is a second or third language for the learner, proper arrangements should be made for the appointment of teachers who are well grounded in the languages predominantly used in a particular area.
- School governing bodies and principals should not only be made aware of the policy, but should also be empowered and capacitated on how to implement and lead the rationalization and redeployment process to address the needs of learners, teachers and the school in general.

5.5 ACHIEVEMENT OF RESEARCH OBJECTIVES

5.5.1 Research objective 1



To determine how schools and educators benefit from rationalisation and redeployment.

Benefits associated with rationalisation and redeployment include the balancing of learner-teacher ratios in schools, reducing the number of teachers per school and distributing such teachers to schools where they are needed the most, saving money for the Department of Education (see chapter 4).

5.5.2 Research objective 2

To explore the challenges that educators and the SGBs encounter with the implementation of the policy on rationalisation and redeployment.

Challenges related to rationalisation and redeployment comprise of the top-down approach used in policy formulation, lack of understanding, misinterpretation of the policy by policy implementers (see chapter 4).

5.5.3 Research objective 3

To determine the interface between instructional requirements, rationalisation and redeployment.

This has been outlined in chapter 4 where work overload, low teacher morale, compromised quality teaching and learning due to overcrowded classrooms, language barriers and lack of transport for the learners to and from school were highlighted.

5.6 RECOMMENDATIONS

Based on the findings as discussed above, the researcher makes the following recommendations:



5.6.1 Recommendations for practice

The following are recommendations the researcher proposes:

- The three-year cooling period should be adopted so that there is no disruption to teaching and learning in all phases.
- Scholar transport must be taken back to the Department of Education as the custodian of learners.
- There should be intensive workshops for principals around the implementation of this policy.
- Involve schools and parents during the policy formulation as they are the frontline implementers of the policies.
- There should be limited engagement of politics in Education.

5.6.2 Recommendations for further research

It is imperative to note that there is a reason for a possible future research, which may include the following:

- Venture and explore the perceptions of educators and SGBs in both secondary and primary schools in urban areas.
- This study was conducted in rural schools where there is generally a shortage of human, physical and financial resources. Further research could be done in well-resourced schools to ascertain whether findings from this study can be generalized.
- Engaging the use of quantitative methods in order to generalise the perceptions and experiences of more teachers, HODs, principals and school governors in order to expand the scope and improve analytic power of the study (Feiteira, 2017).



5.7 LIMITATIONS OF THE STUDY

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Limitations are matters and occurrences that arise from the study which are outside the researcher's control. Thus, every study, no matter how well it is conducted and constructed, has limitations.

The study did not include all high schools in the district under study. It was confined to a relatively small number of participants and two rural high schools in the Alfred-Nzo West Education District. There is, therefore, a need to replicate the study in other districts in the Eastern Cape Province. This study was conducted before the amalgamation and realignment of Districts which was done when the data were already being collected, hence, two high schools. Interviewees might have experienced a sense of discomfort in openly deliberating about their individual insights and perceptions regarding rationalisation and redeployment. One participant refused to take part in the research process at the 11th hour. Some participants were also a bit reluctant to delve deep into

some matters during the interviews, despite having been assured of their confidentiality and anonymity.

Furthermore, the interviews could have interfered with the administrative tasks, afternoon classes or time allocated for extra-mural activities. A major limitation of the study was linked to time constraints as the researcher could spend only four weeks in the field because of employment commitments.



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APPENDICES

APPENDIX A

INTERVIEW SCHEDULE

PRINCIPALS AND TEACHERS

1. How familiar are you with the policy on rationalisation and redeployment?
2. How was the rationalisation and redeployment policy communicated to you?
3. Would you describe the strategy used to communicate rationalisation and redeployment to schools as transparent?
4. In your view, how did the rationalisation and redeployment policy contribute towards uplifting the academic standards within the school?
5. What challenges do you experience with the implementation of the rationalisation and redeployment policy?
6. In what way does rationalisation and redeployment take into account the needs of the schools?
7. Does rationalisation and redeployment hold any benefits for learners?
8. How do you perceive the impact of rationalisation and redeployment policy towards the quality of teaching and learning?
9. What do you think should be done to minimise the or increase the impact of rationalisation and redeployment?
10. In what way can rationalisation and redeployment be amended to make it more sensitive to the needs of the schools?

SCHOOL GOVERNING BODIES

1. How familiar are you with the policy on rationalisation and redeployment?
2. How was the rationalisation and redeployment process communicated to you?
3. How does the policy affect you as parents?
4. What challenges do you experience with the implementation of the rationalisation and redeployment policy?
5. If you were to be given a chance, what could you suggest to be done in order for the policy to be satisfactory and bring stability in schools?

UNION REPRESENTATIVES



1. What is your take on rationalisation and redeployment of teachers in our schools, district and or province?
2. How are your members consulted when the policy is implemented at your site?
3. The Constitution of our country refers to Human rights in Chapter 2, The Bill of Rights. Section 29 of the Constitution refers to the right to basic education. Do you think that this right is taken into account in terms of rationalisation and redeployment of teachers?
4. Do you think that the policy is fair and just to learners, parents and teachers?
5. Are there complaints or comments from your constituency (educators/colleagues) about the policy, and what are they saying?
6. How does this policy impact on teaching and learning in as far as the instructional requirements are concerned?
7. What challenges do you experience with the implementation of the rationalisation and redeployment policy?
8. In your view, in what way has the rationalisation and redeployment policy contributed towards the quality of teaching and learning?
9. What strategies do you think should be put in place that will contribute towards successful implementation of the policy?

10. What do you think should be done to minimise the negative impact of rationalisation and redeployment?

HEADS OF DEPARTMENT

1. How was the rationalisation and redeployment process communicated to you?
2. Would you describe the process in relation to rationalisation and redeployment broad enough and inclusive of all stakeholders?
3. How does this policy impact on teaching and learning in as far as instructional requirements are concerned?
4. Have you ever received any concerns from teachers in your department due to rationalisation and redeployment?
5. Section 29 of the Constitution of our country refers to the right to education. Do you think that this right is taken into account in terms of rationalisation and redeployment?
6. In what way did the rationalisation and redeployment influence the staff morale?
7. What challenges do you, as a school experience with the implementation of the rationalisation and redeployment policy?
8. In what way does the rationalisation and redeployment take into account the needs of teachers?
9. Does the rationalisation and redeployment policy hold any benefits for learners?
10. What strategies do you think should be put in place that will contribute towards the successful implementation of this policy?

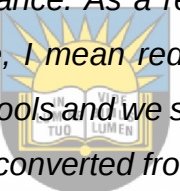
APPENDIX B

INTERVIEW TRANSCRIPTS

PRINCIPALS

Researcher: How familiar are you with the policy on rationalisation and redeployment?

Respondent 1: *"Well, I am familiar with it as it has long been in place despite the fact that it had not been taken very seriously by other districts in our province, it was just a name as nothing was ever done to such resistance. As a result, there was a stage where it literally stalled only to kick-off after sometime, I mean redeployment. Well rationalisation is a new term that came with realignment of schools and we started to hear it mid- 2013". Well it kicked-off in 2014 where some schools were converted from Junior Secondary to Senior Secondary and in some cases learners moving from Junior Secondary to Senior Secondary, I mean Grade 8 and 9 learners"*.



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Researcher: Junior Secondary converted to Senior Secondary, what about other grades that were at Junior Secondary?

Respondent: *"They had to move to neighbouring primary schools"*.

A follow up question was posed on the year in which it stalled wherein the respondent could not recall.

Respondent 2: *"What I understand about rationalisation and redeployment is that, it is the balancing of teacher numbers in accordance to the learner numbers in schools. It involves adding teachers in schools where there is a need and also taking them away from schools where they are in excess and the rationalisation part of it came very late and I cannot recall the year but it is just recently where we started to have schools that commence from Grade 8 to 12 and R to 7"*.

Researcher: How was this policy communicated to you?

Principal 1: *“As the policy is old, I cannot recall, but if my memory serves me well, there was advocacy around it and a series of departmental circulars were distributed or issued through Education District Offices which explained explicitly the procedures to be followed when implementing the policy and was received with mixed-feelings by the intended consumers. There was never a stage where anyone could boldly say he/she understands how well it would be followed; especially with the ‘LIFO’ thing in as far as redeployment is concerned. LIFO had been misconstrued to refer to the arrival of a teacher at a particular institution (school) yet it actually referred to the date of first appointment as a teacher”.*

Researcher: What about rationalisation?

Respondent: *“We were not aware that when talking about rationalisation it also referred to what happens to the schools. We only realised that in the meetings that were called for the community where the issue of closures, mergers, migration of Grade 8 and 9 to high school was explained by the Departmental officials and representatives from the SADTU local executive committee”.*

Researcher: How did parents conceive it?

Respondent: *“Yeah, well they had some concerns about their children having to move from their schools to other villages for schooling, but were just informed that it was a government policy and it had to be implemented as it has been implemented”.*

Respondent 2: *“It was communicated through circulars and communicated in meetings”.*

When asked about the nature of meetings wherein the policy was communicated the respondent's response was, *“Through rush-rush meetings instead of workshops”.*

Researcher: Would you describe the strategy used to communicate rationalisation and redeployment policy to schools as transparent?

Respondent 1: *“To a certain extent I can say it was transparent as there were advocacy meetings and the presence of union representatives in such meetings. On the other hand, the very union reps seemed to have been convinced to understand it when presenting before*

their constituency. Maybe they did not want to disappoint the government of the day of which they resonate well with and remember, at that time the spirit of change was still held in high esteem, so, no one wanted to appear as antagonistic to the policies of the ruling party and not after liberation. You may never know...!

Respondent: 2 *"It was transparent but not easy to implement as it used to be 'last in last out' orientated. This meant that if a teacher is redeployed from school A to school B this year and the same teacher is in excess in school B the following year, and the same teacher would have to move to another school. Well with rationalisation part of the policy, it was transparent let alone that it was presented in a rush-rush fashion".*

Researcher: Would you really say that it was the policy was really communicated in a transparent manner?

Respondent 2: *"Not really as expected...because stakeholders were not at all consulted, I mean parents, traditional leaders, religious leaders and community-based structures.*

The researcher as a teacher as well had to seek clarity on the issue of 'last in last out' issue and the respondent clarified that it was the slippery of the tongue, instead he wanted to say 'last in first out' where the last person to arrive at an system would be the first one to leave when it was time to redeploy or time to identify people (teachers) to be redeployed.

Researcher: In your view, how did rationalisation and redeployment policy contribute towards uplifting the academic standards within schools?

Respondent 1: *"This is a tough one, actually it did and it didn't.....egh..., at first it was a smooth sailing as each school had one or two specialists in a particular subject and the academic outcomes were impressive, but due to the undulating learner enrolment which is as a result of migration and urbanisation, that is not something worth noting. As we speak, we have subjects that are taught by SGB-paid teachers due to lack/shortage of subject specialists as the policy only looks at the number of learners irrespective of subjects done at school. It is even worse with our feeder-schools where some schools have three or four teachers from Grade 1 to Grade 7. Are they trained to teach all the Learning Areas, is there any quality teaching and learning under such circumstances? That is a million-dollar question begging*

for more questions than answers. It is no wonder why there is such a huge gap left unfilled in subjects and learning areas they do. I don't even want to blame those poor teachers 'monna heso' (my brother), they are just victims of the system or policy; they are expected to do miracles, 'ke Jeso feela a neng a tseba ho etsa mehlolo' (only Jesus could perform miracles). Our region, Transkei used to be the destiny of choice when it comes to academic performance in the past as there was nothing like equating learners to commodities".

For the sake of clarity, the researcher had to pose another question relating to commodities. The question was phrased as follows, "What do you mean by 'equating learners to commodities?'" The response was that the model used to staff schools (Peter Morkel Model) should have been borrowed from the business sector where a factory may have a high output with fewer employees because of the machinery used there.

Respondent 2: *"In some cases schools benefited especially those with shortages but..., this policy has brought a lot of strain to teachers with fewer learners because as their numbers get reduced, they remain with the same or more workload because they have to teach many subjects after the redeployment". At least if rationalisation was implemented as advocated, that is merging small schools, it would be much better but the only challenge would be for the young ones, Foundation Phase to leave their village to another which might be far".*

Researcher: What challenges do you experience with the implementation of the rationalisation and redeployment policy?

Respondent 1: *"A lot, ntate. In most cases or since the unfolding and the implementation of this policy, teachers tend to keep quiet in meetings called for this exercise, redeployment. Every teacher wants to be immune from this process. The other thing is that it becomes very difficult to allocate subjects to teachers as the workload tends to be too much for them, and moreover some teachers are not experts in some subjects as more often than not, they will be forced to teach subjects that they have only done up to matric as there is no subject that may be left without some teacher teaching learners. On another note, we are always at loggerheads with parents as we are forced to recruit teachers to be paid by the SGB through fund-raising. Our school for instance is a 'No-fee' school but we are obliged to charge fees under the pretext that we are fund-raising, something that has been outlawed as there is a*

standard amount contributed by parents for payment of stipend to these SGB teachers. Mind you, in the SGB the parent component dominates and would always insist that if a parent does not pay, his/her child's report should be withheld, which is very much against the laws in this country".

Respondent 2: *"Teachers are uncertain about their fate; they are not willing to be redeployed to rural schools and worst of all, there is always more workload on the remaining teachers' shoulders".*

Researcher: In what way does the rationalisation and redeployment policy take into account the needs of the schools?

Respondent 1: *"It does to a lesser extent, but to a greater extent, it does not. Look...uhm...learner numbers are used to determine the number of posts to be allocated, what about subjects and or learning areas! It is sad that only the number of learners is used and not subjects or learning areas, that a number of schools have SGB-paid teachers means that the needs of schools are not taken into account but an effort to save costs by the Department of Education. This is more of a gambling game as saving supersedes the precious investment that might yield better outcomes for our country in future. Secondly, when considering subjects, only the number of learners per subject is also considered where at least they have to match the prescribed ration of 1:35, forgetting that subjects like Economics, Business Studies and Accounting attract fewer learners but are very important and may benefit our country. Closing such streams in our schools may be detrimental to our country in future.*

Respondent 2: *"It does not seem to take any consideration of the schools' needs as decisions are made based on figures only".*

Researcher: Does rationalisation and redeployment policy hold any benefits for learners?

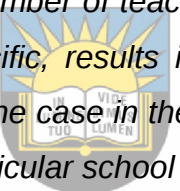
Respondent 1: *"In some schools, 'yes' and in some 'no'. Ntate for receiving schools it does as they will always have enough teachers with each subject having a specialist whereas for schools that lose teachers, learners are disadvantaged and have to contend with teachers*

that are not qualified to teach certain subjects. So...., the answer is yes and no in this situation”.

Respondent 2: *“This will benefit those schools with big numbers but schools with fewer learners will have fewer teachers too, so it means that learners in those schools will lose teachers to the other schools, some streams may have to close down and teachers in those schools will have to overlap.*

Researcher: How do you perceive the impact of rationalisation and redeployment policy towards the quality of teaching and learning in schools?

Respondent 1: *“On overall, I feel that it has had a negative impact towards teaching and learning. You must recall that I have cited an issue of the then Transkei Department of Education where teaching and learning had been applauded throughout the country as there was no regulation pertaining to the number of teachers at school, but since the inception of this policy, redeployment to be specific, results in matric are such a disaster. Prior the implementation of this policy as was the case in the then Department of Education, the now defunct Transkei, all subjects in a particular school were taught by specialists and there was no case of schools having to employ teachers through governing bodies, but teaching and learning was of a high quality.*



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Respondent 2: *“Both positive and negative as I have already mentioned previously when you asked on its benefit for the learners. The impact can only be measured by what it holds for the learners”.*

Researcher: What do you think should be done to minimise or increase the impact of rationalisation and redeployment of teachers?

Respondent 1: *“In trying to minimise the negative impact that I have already alluded to previously, in Mathematics for instance, if every school were to be allocated a teacher per phase specifically for Maths and the other one for Science. These two teachers should not be considered when allocating posts per school more so at High school. But at primary, there is also a need to allocate a teacher who is a Maths specialist. Secondly, the issue of teaching principals should also be revisited. Here I mean that the principal should not form part of the*

number of teachers each school qualifies to have on its establishment. We are always busy with administrative duties and are always away for meetings arranged by the department. In primary schools, there should be a teacher who specialised with Mathematics in order for a good foundation to be laid as early as possible. Our kids lack basics in Mathematics as they are taught by unqualified teachers in this subject.

Respondent 2: *“More consultation is necessary. Decisions must be based on practical facts on the ground, not on figures only. More intensive studies must be conducted so that each school is treated individually because the blanket approach that is presently used does not benefit learners but is just assisting the department in implementing a uniform approach in different environments”.*

The last question to be posed to the principals was related to the previous one just to double-check if there is any consistency or anything that might also assist in coming up with strategies that might see the policy being well-conceived by policy implementers and thereby creating a favourable framework embraced by all. It was phrased as follows:

Researcher: In what way can the rationalisation and redeployment policy be amended to make it more sensitive to the needs of the school?

Respondent 1: *“Once again, principals should not be counted among the teaching cops at any school, rather consider putting them on performance contracts but be given a fair ground on which to operate. I mean schools should be staffed in a manner that all subjects do have teachers who specialised in them. Look for instance, there is this realignment of schools in the province and primary school teachers do not want to come to our schools as they claim that there is a lot of work at high schools. Learners travel long distances as the issue of scholar transport is not reliably offered to schools that deserve it as a result of the programme. The second thing is that as they arrive here is easy to tell that there is content gap in them....and we cannot blame them because they were taught by three teachers in all subjects, teachers who only specialised with only two subjects. When these teachers are redeployed to our schools, they would tell you that they lack experience in subjects that they are allocated to teach. Learners end up dropping out more so in winter and teachers get frustrated as they know they would be redeployed. So, I think that if each school would be*

allocated the number of teachers that equal the number of subject, the situation would be much better than it is right now”.

Respondent 2: *“By conducting a comprehensive study of each school and base the decisions on the circumstances surrounding that particular school”.*

SCHOOL GOVERNING BODY

Researcher: How familiar are you with the policy on rationalisation and redeployment?

Respondent 1: *“I am not familiar at all because we were not work shopped or even consulted especially the redeployment part and the intention thereof. With rationalisation, there is an imbizo that was called where people from the District Office talked about schools that were to run from Grade R to Grade 7 and some from Grade 8 to Grade 12 and they said that process will be called rationalisation. Many promises were made there and it appeared to be a noble idea. As for the redeployment, there was no explanation to us as parents regarding the intentions of moving teachers around year in and year out”.*

Researcher: You say you were in a meeting where rationalisation was explained, what about redeployment?

Respondent 1: *“Some teachers moved and we were told or let me say requested to pay money so that no subject cannot be taught because of few learners being left at school and subjects are still the same number as before the departure of teachers who left”. Like I said, there was never any explanation to us as parents of learners just like in the rationalisation issue”.*

Researcher: You said that rationalisation came with promises that made it to appear a noble idea. What promises were made?

Respondent: *“We were promised transport for our children and we are still waiting for that transport because learners are walking to school, that is still to be fulfilled if it will ever”.*

Respondent 2: *"It is an educational policy that was meant to address inequalities and imbalances that were imposed by the pre-democratic South Africa, but thorough explanation is required, more so on redeployment process, how it is being implemented"*.

Researcher: What exactly needs to be explained about redeployment?

Respondent: *"The explanation we lag behind with is why certain teachers leave our school and why such teachers and not others. You know we are aware that at work, it sometimes happens that teacher X and the principal may not always be on good terms, so the principal is the one who is in charge of everyone at school, so we always suspect that he might use his powers to chase away people from the school because unlike rationalisation, it was never explained to us as parents of children here or anywhere where some of our children are"*.

Researcher: How was the rationalisation and redeployment process communicated to you?

Respondent 1: *"We were just informed by the principal that this is what the Department is intending to do"*.



Researcher: Where and how did he inform you?

Respondent 1: *"He called us in a meeting and said it was a special and urgent meeting and started breaking news that there is a policy that the Department intends to implement and that it would affect all schools in South Africa, where the number of teachers would be determined by the number of learners at the school. He explained that for every 35 learners there would be one teacher. When asking about subjects he said that did not count but the number of learners...we must reproduce so that our school can have enough teachers for all subjects"*.

Respondent 2: *"This was communicated to the teachers and not us, I mean redeployment. The principal and teachers showed us what they call circulars, and some departmental representatives visited us to explain on a limited basis"*.

Researcher: What do you mean by limited basis?

Respondent 2: *"The departmental officials arrive at us being in a hurry and provide us with less information. This relates to time they spend explaining and at the end to us this*

rationalisation is less meaningful. We were happy to have our children at high school for a longer period, but that the policy promises have not yet been met leave us with questions on whether it was well communicated or not”

Researcher: How does the policy affect you as parents?

Respondent 1: *“It affected us a great deal, emotionally and financially. It has led to confusion because in the process, we were told that both Grade 8 and 9 would move to high school and some teachers were to follow learners...and one of my children had to move to X-High School (Name of the high school hidden for anonymity), there was a promise of scholar transport which we are still waiting to get. At the present moment I am paying R300.00 a month for a child who is commuting to and from school every day yet he was attending at that school (pointing to the direction where the school is located) where he would walk without any complaint about the distance. Moreover, where the second child, e manyane (the younger one) is schooling, we pay for the services of out-of-state paid teachers due to shortage of teachers there. So, this affects me both emotionally and financially as I do not work but want children to be educated”.*



Respondent 2: *“It causes confusion, due to miscommunication that I have already alluded to; I mean lack of more information”.*

Researcher: What do you mean by ‘miscommunication’?

Respondent: 2 *“Ntate, parents lack thorough information and often complain to us that our schools do not have enough number of teachers and their children are not taught unlike in town or less remote schools, instead the Governing Body and the principal chase teachers away only to make parents pay fees even though they are not supposed to as per legislation, parents do not understand this policy when it comes to redeployment”.*

Researcher: What challenges do you experience with the implementation of the policy on rationalisation and redeployment?

Respondent 1: *“The list is endless, but I will cite some of the challenges, that the right to basic education is violated as learners do not have enough well-trained educators to teach some subjects and this handicaps the potential that our kids might be having. Secondly, it affects*

us as community in deep-rural areas because schools are very few, which causes our children to travel long distances on foot as some of us cannot afford transport fee for our children to and from school. Thirdly, it has caused the poor to remain poorer as there is very little prospect of our learners progressing academically, so it classes our community into haves and have nots. The list is endless as I have already said. Well, as for accommodation to these schools that have received learners from the Junior Secondary Schools, one can just say it leaves much to be desired as schools do not have sufficient furniture and textbooks for the learners. To crown it all, we had been promised scholar transport but until now, that remains a wish and as we are around the school, we witness late coming as the order of the day. There are so many kids who have dropped out because of no scholar transport being availed for them”.

Researcher: What is the longest distance travelled by learners as you complain about distance travelled on foot?

Respondent 1: *“Some travel something like... 9 kilometres to school on foot, and that is a single trip, so if you say to and from it totals up to 18km a day on foot, it becomes worse on adverse days as kids end up not coming to school for some days”.*

Respondent 2: *“Challenges are there, like learners have to change schools; buying new school uniform; transport cost to and from school being borne by unemployed parents, to get their children to school. In most cases learners take a long time not being taught after the affected teacher has left due to redeployment. On the other hand, learners take time to get used to their new teachers, as teachers are changed from one school to the other from time to time. Transport is a major challenge in our case as there are fewer high schools and more primary schools. Some schools have been closed and the young ones also have to get to school, as to how, the parents have to see the how part of it”.*

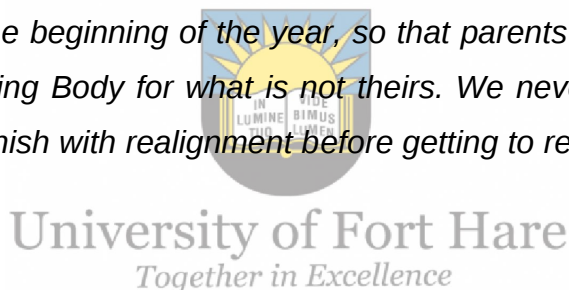
Researcher: If you were to be given a chance, what would you suggest should be done for the policy to satisfactory to you and bring back stability in schools?

Respondent 1: *“Department should consult excessively and extensively with the teachers plus their unions and then with the rest of education stakeholders and implement the recommendations that surface after consultation, hence education is a societal issue.*

Researcher: Who among stakeholders do you feel were left out when the policy was implemented?

Respondent 1: *"I mean the parents because it is their children's' education that is at stake due to the policy".*

Respondent 2: *"I would suggest that it be done at least after three years so that we observe if the enrolment decreases due to money paid to these teachers who are employed by parents through the Governing Body to make up for the shortage of teachers in some subjects. The policy should address the vast difference between the rural and town schools in terms of resources because some of parents take their children to town schools because of resources available in such schools, infrastructure to be specific. The remoteness of the schools should also be taken cognizance of as people move from rural to semi-rural or urban areas due to infrastructure. Workshops should be done around this policy, especially redeployment for parents every year at the beginning of the year, so that parents may not insult the principal and the School Governing Body for what is not theirs. We never came up with the policy! Alternatively, let them finish with realignment before getting to redeployment and not run the two concurrently".*



UNION REPRESENTATIVES

Researcher: How do you feel about the policy on rationalisation and redeployment of teachers in our schools, district or province?

Respondent: 1: *"No my friend, there is nothing wrong with this policy if you were to recall that there were very few schools in the past and learners would walk to those few schools. That there are schools that mushroomed later on to curb this long journey to school does not erase the fact that it had been so before. If you may recall, when OBE was introduced to South Africa, I said this is not going to last because there is a rush-rush and nothing that gets started and is completed. As for redeployment, it is just a way of saving on teachers' salary in that employing more teachers is equal to saying we have more money to pay teachers. How were*

they paid before this policy? But nonetheless, you cannot and never stop a moving train, the train of change”.

Respondent 2: *“The wrong thing about it is that at certain times, some teachers are redeployed from Junior Secondary Schools to High Schools yet they had been attending workshops for the J.S.S or the other way round. This ends up with a negative curriculum delivery in that phase as the teacher lacks the expected expertise”*

Researcher: Are you implying that you are against the policy yet you are a unionist yourself and your union was part and parcel of the Bargaining Chamber where crucial resolutions are taken?

Respondent: *“It is politics, so as a union we agreed to the policy as a matter of solidarity but the other thing wrong about the policy is that it sometimes affects teachers’ rural incentive when moved to areas where it is not applicable and it takes people to places that are far away from where they stay with their families and so it affects their social life as well”.*

Researcher: How are your members consulted when the policy is implemented in your sites?

Respondent 1: *“It differs from school to school and also differs per union affiliation, because some principals do follow the correct procedures as laid down on collective agreements, and some do not want to follow them for their personal interests, to make matters worse, some site stewards and site committee members at schools are not well versed with such crucial policies, so they allow principals to do as they please”.*

Researcher: Okay, Okay, but tell me about your site, I mean at this school.

Respondent: 1 *“The principal usually call a staff meeting wherein he tables the current year’s PPN and when there is a need for comments and the way forward and he also explains the procedure for members to understand and collaborate on decisions that affect our school, but fortunately since I joined the staff here, it only happened once that there be a need for some members to be affected by the policy and fortunately they were due to retire and the following year our enrolment increased and we were never affected instead we were give two more posts that were filled in by two more teachers who were coming on a transfer into our school”.*

Respondent: 2 *"We sit down in a formal staff meeting and identify the curriculum needs of the school and not individual teachers. We look at the subjects against teachers teaching them and try to balance them by way of looking for the subject that is taught by most teachers and try to balance them. On identifying, people are given a chance to volunteer and if there are no volunteers, the principle of LIFO comes to play".*

Researcher: Can you explain this principle as some of the educators seem not to understand it properly.

Respondent: *"It is 'Last in First Out', which means that the one who was employed last in the Department of Education is the first one to leave the school for redeployment purposes".*

Researcher: What if two or three teachers were employed on the same date, month and year and none of them feels like volunteering?

Respondent: *"I really do not know how such a case could be handled as this seems too abstract".*



Researcher: What if it happens as we can have such a situation or might happen as the policy is said to be ongoing?

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Respondent: *"Apho ke mfundisi (in such cases, sir), I think teachers should vote or we must look broader by way of looking at the extra-curricular activities. Say, teacher X is responsible for sport activities and teacher Y is just a class teacher and decide on identifying teacher Y for sport not to suffer".*

Researcher: The Constitution of our country refers to Human Rights in Chapter 2. Section 29 of the Bill of Rights is about the right to basic education, do you think that this right is taken into account in terms of this policy?

Respondent 1: *"It is completely violated".*

Researcher: How is it violated, can you briefly explain your response.

Respondent: *"This policy has confused and demoralised educators because the policy led to the release of Grade 8 and 9 to high schools as part of rationalisation. The expectation was*

that teachers from releasing schools would follow learners to the rationalised and realigned schools but are very reluctant to move. Again, it confused parents as they were promised transport for their children but to no avail in some schools, we need to look at what happens in other schools when dealing with this question and avoid looking at this school only. The long distance that they walk to school leads to high drop-out rate among kids of school-going age, their right is being violated in that way. In addition to all this, learners end up being taught by teachers who are not specialists in some subjects and learning areas. With subjects remaining the same, how do you expect four teachers in the case of primary schools to be able to teach all the learning areas? The same is the case with the high schools where there are streams offering different subjects and learning areas in Grades 8 and 9 and be expected to have less than ten educators. In the past we had a slogan which was very much relevant, 'One subject or learning area one teacher' but it just disappeared into thin air as it was never escalated to the authorities, it ended within our union meetings".

Researcher: Yes, is that all you can say around this issue or is there anything else?

Respondent: "There is a lot 'maan' that indicates how the right to Basic Education is violated. Think of those little souls at the Foundation Phase who have to walk to other schools away from their community just because their school has been closed. They have to wake up early from such a tender age, this result to kids who are made to feel that having to go to school is another form of punishment".

Researcher: But my understanding is that teachers were represented in all these changes through their unions.

Respondent: "Yes, I agree with you but bear in mind that this is just a formality, their presence may not sway the decisions that have already been taken by those with powers or authority. Also bear in mind that union reps are just like a drop in the ocean when considering the number of teachers in the whole country, South Africa, so unions do not constitute even a third of the total number of teachers. We at grassroots are feeling the pinch, where are big guns like Bra T who has since been made a minister straight from being our General Secretary? No monnaeso (my man) let's not be blind-folded here! Is there any other question other than this?" (gets a bit offended).

Respondent 2: *"I think it does, considering that learners will have teachers in front of them where there had been few teachers compared to the school's enrolment, so most if not all subjects will have a teacher for each".*

Researcher: Okay, what about those that will be or are losing a teacher or teachers?

Respondent: *"I think where there are many learners; there should be more teachers to teach them as much as where there are few learners, but the only difficulty if not a strange part is that subjects will remain the same even if schools are left with few teachers. There are schools with very few learners, as few as twenty (20) but they are still allowed to operate with at least a teacher or two until it becomes clear to everyone that such schools should be closed and merged with other small schools to make one viable school in order for learners to enjoy their right to education".*

Researcher: Alright. Do you think that this policy is fair and just to learners, parents and teachers?

Respondent 1: *"It has never started to be fair and just. Remember what I have said in the previous responses. For parents who are unemployed to pay for their children's' transport is not fair at all, worst of all they were never consulted in some cases or let me say, they were just told and theirs was just to listen as their inputs were never considered which means consultation was just a formality my brother, and suffice to say I have made my point clear in the previous question".*

Respondent 2: *"It is not fair and just as I have indicated that for teachers, the rural incentive gets affected and the poor teacher had been used to a bigger slice when it comes to the take-home package in terms of salary and their commitments had been equal to the salary they got before being redeployed. On the other hand it looks fair, it is not like when they had to be declared additional to the schools and be retrenched. It is better to be redeployed than retrenched because that guarantees you job security. For learners, as much as rationalisation is one other way of putting them on the same level with their peers, the distance they travel to where there are viable schools poses a challenge to say whole-heartedly that it is fair and just. Well, with parents it is a whole different story because they were used to having their children walking to nearby schools, but rationalisation has caused them to fork-out huge*

amounts of money to pay for transport to school and some are made to pay for the SGB employed teachers due to redeployment that has led to shortage of teachers visa vis subjects offered at the school. It is worse in our area as it is rural and inhabited by unemployed people”.

Researcher: Are there complaints or comments from your constituency (colleagues) about the policy and what are they saying?

Respondent 1: *“There is a lot of complaints and comments, they complain about overcrowding in some schools as we mix and mingle as teachers; they complain about overload which end up stressing teachers; they complain about the top-down approach being used instead of teachers in general being hands-on and to have a greater input on policies affecting them. They even complain that there is instability in the education system as a result of these many frequent changes.*

Researcher: And so...

Respondent: *“They say that teachers must be part of decision making process on educational issues and policymakers must not only rely on what the unions say because teachers on the ground are the frontline implementers of these policies which are sometimes agreed on compromise and not consensus”.*



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Respondent 2: *“As an office bearer at our branch, I will answer this one broadly and not specifically with reference to my school alone. One principal from a former Model C school came to our office complaining about rationalisation. His school was supposed to be divided into two within the same premises as it starts from Grade R to Grade 12. He said rationalisation in as far as his school was concerned, fixes what is not wrong as his school had never had bad results combined as it is. We therefore referred him to the Schools Act and see if he would see anything talking about rationalisation, as rationalisation is completely a new concept in South Africa. What he needed to do was to go back and work and wait until the process unfolds. Some schools complained that redeployment make it very difficult for principals and their staff during subject allocation as some subjects end up not having specialists in them. A teacher would find him/herself having to teach a subject that he/she last did at matric level and not trained to teach. Some complain about being placed far from their families because they have to relocate and in the process family relations end up getting*

strained; as one would only come home on month-ends which is something that the family is not used to”.

Researcher: How does this policy impact on teaching and learning in as far as instructional requirements are concerned?

Respondent 1: *“Negatively, but for receiving schools one can hardly realise that. In general, receiving schools are very few compared to losing schools. Like I have indicated before that some schools are left with four teachers in seven grades, it means that instructional requirements can hardly be fulfilled. These teachers cannot be expected to be mastering all the learning areas or subjects. Learners tend to be the victims of the circumstances because teaching and learning becomes just a slogan rather than a reality”.*

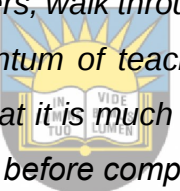
Respondent 2: *“I think I have highlighted some challenges in the previous question; I have made it clear that with redeployment, teachers end-up teaching subjects that they are not qualified to teach and that is a challenge because one cannot be confident enough in the subject he last did in Grade 12, maybe twelve years ago or even more, schools with such teachers do not perform to their potential. That impacts negatively on teaching and learning. Redeployment is a rubbish of a thing, ‘ayikho’, is the same as this PPN (Post Provisioning Norms) that was introduced by Peter Morkel who we don’t know his origin. He is just a white man who does not know and care about teaching and learning, more especially in the African countries. This model of staffing schools may be good but is not addressing the interests of an African child. There are few teachers in rural schools and people end up taking their children to town schools where there are teachers mostly paid through SGB fund when there is shortage”.*

Researcher: What challenges do you experience with the implementation of the rationalisation and redeployment policy?

Respondent 1: *“There is no scholar transport to assist learners to reach to their schools timeously, shortage of furniture, resistance from other teachers to be on the list of additional or excess educators at the school which end up creating animosity between the SMT and post level one educators. People sometimes feel victimised by their principals but also, some principals target teachers who they feel or judge them as troublesome in one way or the other.*

Some teachers choose to resign other than moving to schools far away from their area, especially those that are about to reach an age within which they can retire, that is at around fifty-five years and leave schools with novice educators and learners are left without enough teachers for the school's curriculum needs, hence so many drop-outs".

Respondent 2: "I think I have highlighted some challenges in the previous question; I have made it clear that with redeployment, teachers end-up teaching subjects that they are not qualified to teach and that is a challenge because one cannot be confident enough in the subject he last did in Grade 12, maybe twelve years ago or even more, schools with such teachers do not perform to their potential. As much as rationalisation is a new concept in South Africa like I said, it looks like it was never properly planned for. The reason I say this is that when these schools that are said to be unviable these days, there was a reason to establish them then, let alone that they have few learners and those reasons are still in existence I believe. They still cross rivers, walk through the forests where they might be raped or even worse, be killed. The momentum of teaching and learning gets frustrated by the policy, because I am of the opinion that it is much better for one to finish the work that one has started than just moving a person before completing his task". So, for redeployment this is not taken into account instead teachers are just moved during anytime in the year upon receipt of placement letters".



University of Port Harcourt
Together in Excellence

Researcher: In your view, in what way has the rationalisation and redeployment policy contributed to the quality of teaching and learning?

Respondent 1: "It has somehow contributed positively to some schools and negatively to some. I mean...positively to those that boast high enrolment and negatively to those that have low enrolment, and part of the answer will be given next year, come January 2019".

Researcher: May I request you to briefly expatiate on what you have just said if it doesn't offend you...'come January 2019.

Respondent: "Let me start by this, when I say that part of the answer will be given in January 2019, I say this because in our area this policy became very strong in 2014 when the realignment of schools became a reality, so I am looking at a child who was doing Grade 8 then and is in Grade 12 this year and at the end of the year will sit for NSC exams and results

will tell. Secondly, I say positively because some schools had high enrolment and not enough teachers for such enrolment and their case improved, they enjoy manageable class sizes considering their number. I also say negatively because some schools are left with very few teachers because of enrolment but with equal and the same subjects and or learning areas as those with high enrolment. As for redeployment, since it started, results indicate that it contributed negatively due to the high workload that teachers are complaining about”.

Respondent 2: *“On average, it has but still has the challenges that I have already mentioned. I mean it has contributed positively to some schools. Learners are exposed to their teachers for a longer period when they get to high school, five years compared to previously where they would be with the teacher for three years”. The results are yet to be confirmed at the end of 2018”.*

Teachers



Researcher: How familiar are you with the policy on rationalisation and redeployment?

Respondent: *“Yes, I am familiar because it has been in place for some time now. It started long before it was extended by realignment of schools in the form of moving Grades 8 and 9 to the High Schools”.*

Researcher: Okay, point captured. How was it communicated to you?

Respondent: *“It was communicated through Collective Agreements from the ELRC. This started with Collective Agreement 2 of 2003, (the respondent took time to recall when and which collective agreement actually ushered in the policy, he had to google search it until he asserted that it was collective agreement number 2 Of 2003). He further went on to say, “Yes, it is collective agreement number 2 of 2003 which has since been replaced by collective agreement number 4 of 2016, yes it had been there, they wanted to redeploy when I was at a certain school (name concealed for ethical reasons) but we refused because we would be few to teach properly”.*

Researcher: Having explained how it was communicated to you, would you describe the strategy as to communicate rationalisation and redeployment as transparent?

Respondent: *"Yes, it was as much as it was against the concerned."*

Researcher: Who is the 'concerned'?

Respondent: *"Educators and schools. For losing schools, the strategy meant downsizing whereas others welcomed it. In fact, it was not well consumed by those losing as it meant too much workload. In fact, redeployment had a bad element because receiving schools put pressure on officials to fast-track the process. I remember one official saying that those schools putting pressure were disturbing because they wanted to delay the process for the awaited bulletin which would lead to other teachers being promoted and avoiding losing a teacher only to need one after the process has been done".*

Researcher: In your view, how did or does the rationalisation and redeployment policy contribute towards uplifting the academic standards within the schools?

Respondent: *"Uplifting the standards depends. If a school is set to receive educators it benefits because there shall be no shortages, but if it is to release teachers (ngeke kaloku meaning no ways) because teachers will be overloaded. Take for instance a school with the highest grade being Grade 7 and be left with four or less teachers, yet the Foundation Phase has 12 subjects, Intermediate Phase having 18 subjects and Grade 7 having 9, how can we regard it as uplifting the academic standards? This translates into 39 subjects to be managed by five or even less teachers. You cannot begin to say it leads to uplifting the academic performance because there is a need for a strong foundation and basics if you want to talk about good matric results. Perhaps in the case of high schools we can agree but not completely. In the high school there are different subjects and streams as well as grades!*

Researcher: What challenges do you experience with the implementation of the rationalisation and redeployment policy?

Respondent: *"If you look in the former Transkei, this policy on the rationalisation has led to the downsizing of schools which led to the reduction of learner numbers which inform the number of teachers per school. As for redeployment, I wonder how it will end up. This*

reduction in learner numbers leads or has led to an overload on the remaining teachers because their number gets reduced but the subjects remain the same, they do not change as per the change in the number of teachers”.

Researcher: In what way does the policy take into account the needs of the schools considering what you have just said?

Respondent: *“If you look at the PPN, it only considers the number of learners and educator posts are allocated according to that. It does not consider the needs of schools. Number of learners alone does not and cannot assist at all. It leaves teachers suffering a big deal my brother, it just leads to a disaster as the pass rate at matric level is now a matter of concern as against the past when we were also at school as learners”.*

Researcher: Does the rationalisation and redeployment policy hold any benefit for learners?

Respondent: *“For some learners it does. When Grades 8 and 9 get to high school while doing Grade 8, they see how things are done there, what they are not supposed to do in order for them to succeed in their studies as everyone is obliged to be serious; they begin to know and live to the expected performance and ways of doing what they are at school for and end up rising to the occasion. Teachers are also able to channel them to the relevant streams as per their performance. If a learner is good in EMS, he is advised properly that he/she can follow the commerce stream. In this way teachers are able to groom them properly. But what confuses me or disturbs me is that one leg of the GET is in the Primary section and another in the Secondary section. It would be better if Grade 7 were to be incorporated in the high school and do the same number of subject done by Grades 8 and 9. Alternatively, Grade 7 be left with six subjects like the Intermediate Phase”.*

Researcher: How do you perceive the impact of the policy towards quality teaching and learning?

Respondent: *“The policy has both advantages and disadvantages. Quality teaching is not there at all, think of Foundation Phase combined and taught by the same teacher, they are at different cognitive levels. It is even worse because the policy does not take cognisance of the different languages done in a particular school. In our area, we have both Xhosa and Sotho*

only to find out that they are either taught by someone who does not know one of the two languages”.

Researcher: In saying that you mean there is a subject that might suffer at the expense of another that the teacher knows quite well?

Respondent: *“Exactly and the Home Language is considered a failing subject. A learner may get all level 7 in other subjects, but if that learner fails the Home Language he/she is as good as having achieved nothing in the grade. Receiving schools may see the positive impact because there shall always be enough teachers to be allocated as per language expertise. Remember ‘Mhlekaazi’ (Sir) that this is the foundation and if it is not strong enough it will never be strong at the roofing level”.*

Researcher: What do you think should be done to minimise or increase the impact of this policy?

Respondent: *“My opinion is that, for the policy not to affect schools negatively, the Department of Education should ensure that:*



Firstly, schools with Grades 1 to 7 must have seven (7) educators plus the principal as a minimum. Secondly... (the researcher interjected for clarity purposes)

Researcher: Why excluding the principal from this number, why can't he be included in this number you are suggesting?

Respondent: *“Okay, let me include him because our government is fighting teacher numbers to save on salaries, but I wanted him/her to be excluded because you guys do not have ample time to stay at school, in class; you are always in the meetings called by the District Officials, under-performing school principals’ workshops; making submissions; the list is long. You are just not doing justice to the poor children, but not intentionally, because of the magnitude of your positions and responsibilities. That is why I feel principals should be excluded from teaching but make sure that the core business, as it is called is done at school.*

Secondly, if a school starts from Grade 1 to 7 and have fewer learners, that is the threshold of 135 which is at times too much for other schools, as some schools have around 90 learners,

let such schools merge with others and be provided with scholar transport so that there can't be a case of overloaded teachers. Few as they are, they still need to be taught like others.

Researcher: Okay, my brother, let's move to the other question, maybe you will exhaust your views about this one as I can sense that you are getting heated up:

In what way can the rationalisation and redeployment policy be amended to make it more sensitive to the needs of almost all schools?

Respondent: *"Heke (Yes!), to minimise what I have said before against the policy, if the Department of Education decides to do something, let it be done and looked and assess the outcomes, like the rationalisation part of the policy and look at the challenges it presents and what best could be done because here is a school with learners. For example, there was a school that was having only three learners and three teachers and it meant that the other teacher was just visiting and the school was not viable. Even if you do not merge it with another one, some schools need to be closed when unviable but once more provide transport.*

When looking at a period before 1994 some schools had more teachers than they were supposed to have. So, in order to avoid retrenchments, the issue of redeployment came to the fore but as teachers we were saying let it not rest on Peter Morkel Model which is only based on numbers as at schools there are subjects and streams. To amend the policy, it is advisable that consideration should be given to subjects, the focus should not only be on PTR. People Teacher Ratio must not fluctuate to appease the employer as is the case at present, it should be constant".

Researcher: You mean that it should be 1:40 at primary and 1:35 at secondary.

Respondent: *"No we have long been objecting this arrangement, we as teachers we suggested that at Primary School the ratio should be 1:33 and 1:30 at High School. For Technical High Schools, five learners is the maximum, so we propose that at least it should be 1:15, but if it is a mixture of technical and other subjects, let it be 1:28. We also feel that the PTR should be 1:30 as a standing rule or principle throughout the province if not the country".*

Head of Departments

Researcher: How was the rationalisation and redeployment process communicated to you?

Respondent 1: *"It was communicated in general teachers meeting where the union was putting its members on board with the new developments in education".*

Respondent 2: *"It was communicated by the District Officials....It was realised that the Eastern Cape is the only province which still has Junior Secondary Schools and their Senior Secondary Schools run from Grade 10 to Grade 12. We were just told that this is to happen.*

Researcher: How were you told?

Respondent: *"Was that a workshop...I don't know but it was not communicated well. It was rationalisation and realignment...and those terms I still don't know them because to me to be rationale is to think well and I wondered how the two fit in well with realignment. I think with regard to realignment, it aimed at aligning the provincial education system in order for it to be country aligned".*

Researcher: Yes madam, in actual fact the two words may be used interchangeably as other people will come with realignment and the other will talk of rationalisation.

Respondent: *"Okay".*

Researcher: Would you describe the process in relation to rationalisation and redeployment as broad enough and inclusive of all stakeholders?

Respondent 1: *"It is not broad and inclusive enough of all stakeholders because there is no correspondence regarding the process to the School Governing Bodies regarding its effectiveness and implications towards teaching and learning for their children".*

Researcher: Are you saying that the SGB was never informed or consulted?

Respondent: *"Yes, I feel they should be informed about redeployment in particular, as it is the one that causes confusions and frustrations at the schools".*

Respondent 2: *"No..., not inclusive at all, it most parents knew and still know very little about it, they complain that learners leave schools nearer home and walk long distances to their new schools. I think with the roadshows, officials are thinking that they consulted broadly. Am I correct to say it was never transparent....? Yes, it is just like the issue of quintiles...Do you think we that our school should be in quintile one? People who surveyed were narrow because you can't force the local people to bring their children here. We don't qualify for quintile one because our learners are from middle-class people, local children are all over the show, Qwaqwa, Cape Town and many other areas. Here we have teachers; nurses; doctors; clerks' children to mention but a few. So...It was imposed, the two are just the same as they were imposed".*

Researcher: How does this policy impact on teaching and learning in as far as instructional requirements are concerned?

Respondent 1: *"It is very much disturbing as it leads to a high failure rate in most schools as it leads to some subjects and or streams left without teachers".*

Researcher: What do you mean when you say some subjects and streams are left without teachers?



Respondent 1: *"As a result of teachers moving from schools where the enrolment has declined, the number of subjects remains the same and some subjects that were handled by those teachers who have departed remain without the teacher. On the issue of streams, it is never easy to close certain streams instantly, it has to be a gradual process where maybe this year in Grade 10 a particular stream is closed, only to remain in Grade 11 and 12, the following year it be closed in Grade 11 and remain in Grade 12 which is the final year. During that process, there is no capable teacher teaching such learners which goes without saying that such learners can hardly make it in Grade 12 and therefore a high failure rate".*

Researcher: In such cases what does the principal do to make sure that in the remaining grades learners get assistance with those subjects before the stream is completely phased out?

Respondent 1: *"My leader, it becomes very difficult as the SGB, the SMT and teachers would share ideas on how the situation could be saved and end up agreeing that the matter be brought to the parents' attention with the aim of convincing them of a need for fundraising in order to secure the services of someone to assist and be paid by parents through fundraising, and in some cases learners who passed Grade 12 are sometimes used just to have some assistance for the poor learners who tend to be the victims of the system or policy".*

Researcher: Is it an easy task to perform, I mean do parents willingly agree to such an arrangement?

Respondent 1: *"It is never easy because they would agree in a meeting but when they are supposed to fulfil their promise, they become very sluggish in making such contributions. I remember at one stage the poor child had to go home on a month-end without getting the full amount that he was promised due to non-availability of funds to pay him. Remember parents around here are depending on social grant"*

Researcher: How much does each parent or household contribute towards payment of such people?

Respondent 1: *"The amount is mostly determined by parents, but in our case they agreed to pay an amount of R50.00 per child per parent and were adamant that it is a fair amount even if one has two or three children at school. But guess what, the very people who felt that this was a fair amount end up not paying at all and the school sometimes, with the available funds end up paying part of the amount for the teacher to be able to fix some of his obligations like buying food, fuel etc".*

Respondent 2: *"You see, because it is here at a high school and the...I don't know where to start..., it has a negative impact because it did not go well. It did not come with all the accompaniments because human resource did not come, not aligned because 100 learners come doing nine subjects in the two grades, 8 and 9 and only two teachers come and these two teachers...can they teach all the nine subjects as they arrive at a school where teachers already have their workload? No ways, and all these subjects are compulsory and then you are told that this is your PPN and is inclusive of those subjects done at high school. They are just fitted on to the existing the existing learners. It impacts negatively even to the learners*

because when they come, they come to a high school where teachers are not conversant with what these learners ought to be taught. If it could be said that here are their teachers...then it could be smart”.

Researcher: In a few words, how and why do you feel it impacts negatively?

Respondent: *“It leads to teachers being overloaded as there is an addition of the workload to the already existing overload and no individual attention to the learners”.*

Researcher: Have you ever received any concerns or complaints from teachers in your department as a result of rationalisation and redeployment?

Respondent 1: *“Yes, teachers are complaining about high workloads as they would always ask who will teach the subjects that are left without teachers because parents cannot employ many teachers and they, teachers, are already overloaded with their work, some even go to an extent of contemplating resignation as two teachers have already resigned from our school citing the frustration of exorbitant workloads. They complain also that there had been a promise that when schools realigned, teachers from schools where Grades 8 and 9 were coming from would follow learners but that is not the case, there is a lot of resistance and those that did follow would always complain that they are not comfortable with the subject allocation as they only have Junior Secondary School experience where they had been teaching since graduating as teachers”.*

Respondent 2: *“There are many even though people would not want to speak about rationalisation but there are many concerns, the government is trying to save money by using us instead of hiring additional teachers. They do not bring children to our schools with the human resource, they use us who are already here, people complain about overload and being at the GET phase and FET phase at the same time. Moving from Grade 12 to Grade 8 means that the level of the language used must also change drastically. There are no material resources, learners did not come with them. To us, the Senior Phase CAPS document is not clear at all, the department is not ready for rationalisation, but it is just that it has been introduced. Even OBE was introduced in this fashion and it failed”.*

Researcher: As per Section 29 of the Constitution of the Republic of South Africa which refers to the Right to Education, do you think that this right is taken into consideration in terms of rationalisation and redeployment?

Respondent 1: *“Partly, yes when looking at the previous dispensation where resources were concentrated in certain schools, the former Model C schools. So resources were distributed so that all children can enjoy equality in education. On the other hand, this policy is depriving the learners of their right to education considering that some schools end up being under-staffed which hinders their real potential of doing well academically due to shortage of people who can assist them to unleash their potential due to consideration of learner numbers instead of the curriculum needs of the school”.*

Respondent 2: *“Taking into account, in which way?”*

Researcher: Can we say the policy enhances the learners’ rights to basic education?

Respondent: *“We cannot say it enhances. If children are taken away from their parents and they have to walk long distances...it is already traumatising them. You see once the young ones mix with the old ones, they get spoilt emotionally, physically and otherwise. People think differently about this policy, and positively because they want it to appear as if it is working. In the play grounds, the young ones are just there to cheer the old ones, this is traumatising them, so in the extra-mural activities they are side-lined; in the co-curriculum, they are not catered for because they have no teachers. A full component of the GET teachers would really enhance and take into account the rights of learners to Basic Education. I am referring to Grades 8 and 9.*

Researcher: What challenges do you as a school experience with the implementation of the rationalisation and redeployment policy?

Respondent 1: *“It provokes the negative feeling that results in anger from those that are deemed additional to the institution and even those that are not affected. Some teachers more especially the ones that are said to be additional, sometimes feel hard done by the management of the school. Khumbula ukuthi (remember that) when the policy is implemented, the principal of the school and his management team call for staff meetings*

where the principal chairs the meeting and also lead the discussions. Secondly, he is the man in charge of seeing to it that there is proper teaching and learning in the school, so he is supposed to minimise the challenges that might arise, bearing in mind that this is an obligation that has to be fulfilled, it is not a matter of whether he likes it or not”.

Researcher: Is that all?

Respondent 1: *“The poor principals are sometimes faced with the challenge of having to explain to the parents why teacher X and not teacher Y have left their school. Some of these teachers are bona fides of the surrounding where the school is located. That alone prompts the community to rise against the principal. One principal in the neighbourhood had to move from his school to another as the community could not understand why a particular teacher had left their school; they thought that it was the principal who had chased the teacher away for one reason or the other”.*

Researcher: How does that principal feel or say about what befell him?

Respondent 1: *“He is very bitter about what happened to him as if that was his own making and not the system, he even says he would see if there is anybody who is going to last long in that community for as long as the policy is still in place, seeing that there are fewer households and inhabitants in that area which goes without saying that there shall never be any substantive growth in the school’s enrolment in that area”.*

Respondent 2: *“Yes there are challenges.... the PPN that excludes these kids, Grades 8 and 9”.*

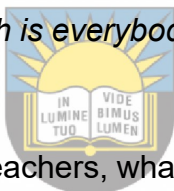
Researcher: But I am aware that there is a standard ratio that is being used, 1:35 for high schools and 1:40 for primary schools.

Respondent: *“Yes on paper it is there but practically it does not work because learners do different subjects. For instance, learners are doing different subjects except for the two grades, 8 and 9. English First Additional Language is done by the majority of the learners. Here you cannot talk of 1:40 or 1:35. In a class there are more than 35 learners, maybe 100..., so are we going to say 1:35 in this case. People do not want to do things properly; the Department of Education does not want to address what needs to be addressed. You cannot*

divide the number of learners by the number of teachers a school qualifies to have, that is unheard of! that is why we encounter challenges such as overload for the teachers and low teacher morale.”.

Researcher: In what way does the rationalisation and redeployment policy take into account the needs of the teachers?

Respondent 1: *“No! Come on my brother. That is a straight forward question and a rhetoric one! It is clear that the needs of teachers are secondary to the implementation of the policy, the primary thing is to see it being implemented against all odds. Educators are overloaded and do not have ample time for one-on-one contact with the learners; teachers are also forced to teach subjects they are not trained and licensed to teach, which is frustrating indeed. Teachers are forced to move to places that are far away from their homes and in the process their belongings end up broken by continuous movement from one place to the next. They are separated from their families which is everybody’s wish to be nearer their families, so the policy does not consider such at all”.*



Researcher: Okay, I’ve heard about teachers, what about learners, does it, that is the policy, hold any benefits for them, the learners this time?

Respondent 1: *“Some benefit and some do not. Let me start with those that do not benefit from the implications of the policy, as much as the policy intention at face value aims at assisting the learners, it becomes very difficult when some of the promises are not fulfilled, like your scholar transport and having to walk long distances in order to get education which is what they were never used to. When getting to school they are already tired and can hardly concentrate during teaching and learning; they always have to think about another journey home on foot. Not having proper accommodation is also one of the hindrances towards claiming any benefit for them as most schools in the rural areas do not have sufficient classrooms to accommodate these learners and are forced to be taught outside even when weather conditions are not that good for such. That there is no chance for one-on-one specialised attention to them, there is no benefit at all. It becomes even worse when they do not have teachers for certain subjects or learning areas for an unspecified period of time.*

Well for those that have enough teachers as per their enrolment, they do benefit because every subject is taught by a specialist teacher, but on the other hand accommodation surfaces as the only challenge that I can allude to. Otherwise they enjoy some benefits comparatively”.

Respondent 2: *“It doesn’t although some may say ‘yes’ yet practically the answer is ‘no’.*

Researcher: How or why?

Respondent 2: *“You need children to understand what you teach them and live it and the Department is frustrating all that in various ways. For instance, the GET learners who are at high school are seldom given much attention due to a series of CASS moderations, people tend to concentrate much on FET CASS moderations and very little time is devoted to the GET grades. So, the clear-cut answer is ‘no’. it would benefit the learners if the Department would employ more teachers*

Researcher: What strategies do you think should be put in place that will contribute towards the successful implementation of this policy?

Respondent 1: *“No clear-cut answer for this one, but I would suggest that the policy be withheld and not withdrawn until the government has levelled the ground by way of the blueprint that they tabled before rushing for the policy implementation. Scholar transport is a must for learners, building hostels for learners from those schools that have been closed needs to be prioritised; in fact, all the necessary arrangements must be made. For now, the department must employ teachers according to the streams offered at a particular school and each subject must have a teacher. One teacher, one subject, then the results will improve for the better”.*

Respondent 2: *“I would say the Department should take care of the human resource for the GET phase, employ a full component of teachers for the two Grades. There are many teachers who are unemployed yet qualified. Schools should be involved in this process like taking statistics of learners from schools that are to receive a certain number of learners as well as teachers who are likely to be added to their school. If I were part of the decision-makers 100 learners from GET phase would be followed by at least four teachers for the nine subjects per grade instead of the two that we are used to. The Department should listen to*

teachers, the implementers of the policy on how best it could be implemented and improve the results for the province in the NSC pass rate. A bottom-up approach is necessary for the policy to be effective, teachers' voices must be given an ear because they might know how best it can be polished and be without such challenges that it presents in the present format".

Researcher: Thank you so much for your time and I would also like to point out that if there is anything that we discussed that might need clarity; I will make another appointment and please do not get offended. Thank you once again.

Respondent 1: *"You are welcome, but please hint me before you come for clarification so as to arrange for proper words to make you understand. Thank you ntate and good luck for your studies".*

Respondent: 2: *"All the best in your pursuit to better your qualification, maybe you may end up being in the District Office".*



University of Fort Hare
Together in Excellence

APPENDIX C

APPROVAL LETTER FROM TO CONDUCT RESEARCH



MALUTI DISTRICT OFFICE

206 Magistrate Street • Maluti • 4740 • Postal Address :Private Bag X 9003• Matatiele • 4730 •
REPUBLIC OF SOUTH AFRICA • Tel: +27 (39) 256 0516 Fax: +27 (39) 256 0516• Cell 0722168227 Website: ecprov.gov.za •

TO : MR. V. S. MGOJO

FROM : OFFICE OF THE DISTRICT DIRECTOR

SUBJECT : RESEARCH APPROVAL

Date : 15 MARCH 2017

Name of Researcher	Mr. Vuyani Sybriel Mgojo
Address of Researcher	PO Box 549 Matatiele 4730 Caba Village Matatiele 4730
Study Course	Doctor of Philosophy: Education
Student Number	201415720
Institution	University of Fort Hare
Contact details	084 410 2314
Email address	gojis1966@gmail.com
Research Topic	Educators and School Governing Bodies perceptions on Rationalisation and Re- deployment : A case study of two schools in the Matatiele-Maluti Education District
Number and type of schools	Two High Schools

This letter serves to indicate that approval is hereby granted to the above-mentioned researcher to proceed with research in respect of the study indicated above. The onus rests with the researcher to negotiate appropriate and relevant time schedules with the school/s and office/s involved to conduct the research.

The following conditions apply, and approval may be withdrawn should any of the conditions below be violated:

1. The District concerned must be presented with a copy of this letter that would indicate the said researcher has been granted permission from the Eastern cape Department of Education to conduct the research
2. The District Office must be approached separately and in writing to conduct the research
3. A copy of this letter forwarded to the school principal and the Chairperson of the

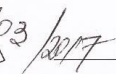
4. A letter/document that outlines the purpose of the research and the anticipated outcomes of such research must be made available to the principals, SGB's and District/head office Office/Senior Managers of the schools and districts/offices concerned, respectively
5. The researcher will make every effort to obtain the cooperation and goodwill of all the ECDE Officials, principals and Chairpersons of SGB's, teachers and learners involved. Persons who offer their co-operation will not receive additional remuneration from the Department while those that opt not to participate will not be penalized in any way.
6. Research may only be conducted after school hours so that the normal school programme is not interrupted. The Principal and/or Director must be consulted about an appropriate time when the researcher may carry out their research at the sites that they may manage.
7. Research may only commence from the second week of February and must be concluded before the beginning of the last quarter of the academic year. If incomplete, an amended Research Approval may be requested to conduct research in the following year.
8. Items 6 and 7 will not apply to any research undertaken on behalf of the ECDoE. Such research will have been commissioned and be paid for by the ECDoE.
9. It is the researcher's responsibility to obtain written parental consent of all learners that are expected to participate in the study.
10. The researcher is responsible for supplying and utilizing her own research resources such as stationery, photocopies, transport, faxes and telephones and should not depend on the goodwill of the institutions and/or offices visited for supplying such resources.
11. The names of the ECDoE officials, schools, principals, teachers and learners that participate in the study may not appear in the research report without the written consent of each of these individuals and/or organisations.
12. On completion of the study the researcher must supply the Director: Knowledge Management & Research with one Hard Cover bound and an electronic copy of the research
13. The researcher may be expected to provide short presentations on the purpose, findings and recommendations of her research to both ECDoE officials and the schools concerned.
14. Should the researcher have been involved with research at a school and/or a district/head office level, the Director concerned must also be supplied a brief summary of the purpose, findings and recommendations of the research study.

The Eastern Cape Department of Education wishes you well in this important undertaking and looks forward to examining the findings of your research.

Kind regards


Mr. L.E. Mtatyana
District Director
(039) 2560 111



 Date

APPENDIX D

LETTER TO RESEARCH SITES

P.O. Box 549

Matatiele

4730

03.03.2017

Gojis1966@gmail.com

The Principal

Name of the School:.....

Sir/ Madam

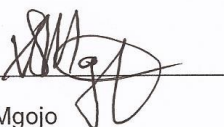
RE: REQUEST FOR PERMISSION TO CONDUCT RESEARCH AT YOUR SITE

I am Vuyani Mgojo. I am currently enrolled with the University of Fort Hare under the supervision of Dr J.N. Pylman. My area of thrust is on educators and SGBs' perspectives on rationalisation and redeployment. I am at the research stage of my study and would like to conduct research at your site with consenting teacher union representative/s, members of the School Governing Body and you.

If allowed to conduct this research, I promise to keep the information and sources as confidential as ever, as no name will ever be attached to any information gathered.

I would like to thank you in advance, hoping that my humble request will receive your due consideration.

Yours faithfully


V.S. Mgojo

MARIAZELL HIGH SCHOOL

Tel. / Fax: 039-256 3032
Cell: 079 693 4984
email: mariazellhighschool@gmail.com



P. O. Box 68
MATATIELE
4730

Dear: Mr Mgojo

RE: LETTER OF ACCEPTANCE

This is to confirm that your request to conduct research at our site is hereby accepted.

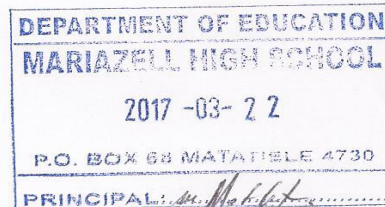
Kindly note that we would appreciate it if you were to arrange times and dates with all your respondents

We wish you all the best.

Yours faithfully

MR P.C Makhetha (principal)

Signature.....*P.C Makhetha*.....



APPENDIX E

CONSENT FORMS

If possible, my organisation would like to come back to this area once I have completed our study to inform you and your community of what the results are and discuss my findings and proposals around the research and what this means for people in this area.

INFORMED CONSENT : HOB

I hereby agree and understand that I am participating freely and without being forced in any way to do so. I also understand that I can stop this interview at any point should I not want to continue and that this decision will not in any way affect me negatively.

I understand that this is a research project whose purpose is not necessarily to benefit me personally.

I have received the telephone number of a person to contact should I need to speak about any issues which may arise in this interview.

I understand that this consent form will not be linked to the questionnaire, and that my answers will remain confidential.

I understand that if at all possible, feedback will be given to my community on the results of the completed research.



Signature of participant

Date: 14/03/2017

I hereby agree to the tape recording of my participation in the study



Signature of participant

Date: 14/03/2017

If possible, my organisation would like to come back to this area once I have completed our study to inform you and your community of what the results are and discuss my findings and proposals around the research and what this means for people in this area.

INFORMED CONSENT : TEACHER

I hereby agree and understand that I am participating freely and without being forced in any way to do so. I also understand that I can stop this interview at any point should I not want to continue and that this decision will not in any way affect me negatively.

I understand that this is a research project whose purpose is not necessarily to benefit me personally.

I have received the telephone number of a person to contact should I need to speak about any issues which may arise in this interview.

I understand that this consent form will not be linked to the questionnaire, and that my answers will remain confidential.

I understand that if at all possible, feedback will be given to my community on the results of the completed research.

.....
Signature of participant

Date: 24-03-17

I hereby agree to the tape recording of my participation in the study

.....
Signature of participant

Date: 24-03-17

If possible, my organisation would like to come back to this area once I have completed our study to inform you and your community of what the results are and discuss my findings and proposals around the research and what this means for people in this area.

INFORMED CONSENT : SGB

I hereby agree and understand that I am participating freely and without being forced in any way to do so. I also understand that I can stop this interview at any point should I not want to continue and that this decision will not in any way affect me negatively.

I understand that this is a research project whose purpose is not necessarily to benefit me personally.

I have received the telephone number of a person to contact should I need to speak about any issues which may arise in this interview.

I understand that this consent form will not be linked to the questionnaire, and that my answers will remain confidential.

I understand that if at all possible, feedback will be given to my community on the results of the completed research.

.....
Signature of participant

Date: 20 March 2017

I hereby agree to the tape recording of my participation in the study

.....
Signature of participant

Date: 20 March 2017

If possible, my organisation would like to come back to this area once I have completed our study to inform you and your community of what the results are and discuss my findings and proposals around the research and what this means for people in this area.

INFORMED CONSENT : UNION REP (SADTU)

I hereby agree I understand that I am participating freely and without being forced in any way to do so. I also understand that I can stop this interview at any point should I not want to continue and that this decision will not in any way affect me negatively.

I understand that this is a research project whose purpose is not necessarily to benefit me personally.

I have received the telephone number of a person to contact should I need to speak about any issues which may arise in this interview.

I understand that this consent form will not be linked to the questionnaire, and that my answers will remain confidential.

I understand that if at all possible, feedback will be given to my community on the results of the completed research.

.....
Signature of participant

Date: 2017/03/24

I hereby agree to the tape recording of my participation in the study

.....
Signature of participant

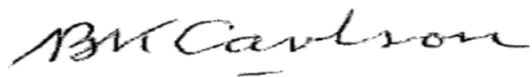
Date: 2017/03/24

APPENDIX F
LETTER FROM THE EDITOR

8 Nahoon Valley Place
Nahoon Valley
East London
5241
13 January 2019

TO WHOM IT MAY CONCERN

I hereby confirm that I have proofread and edited the following thesis using the Windows 'Tracking' system to reflect my comments and suggested corrections for the student to action: *Rationalisation and redeployment: Advancing an argument for policy change* by VUYANI SYBRIEL MGOJO, a thesis submitted in fulfilment of the requirements for the degree of DOCTOR OF PHILOSOPHY (PhD): EDUCATION in the School of General and Continuing Education in the FACULTY OF EDUCATION at UFH.



Brian Carlson (B.A., M.Ed.)

Professional Editor

Email: bcarlson521@gmail.com

Cell: 0834596647

Disclaimer: Although I have made comments and suggested corrections, the responsibility for the quality of the final document lies with the student in the first instance and not with myself as the editor.

BK & AJ Carlson Professional Editing Services