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ASSESSMENT OF GOVERNMENT SPENDING AUSTERITY MEASURES IN ON-SITE SCHOOL SUPPORT FOR CURRICULUM DELIVERY: A CASE OF IDUTYWA EDUCATION DISTRICT

By

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DECLARATION

This certifies that this research study titled: “Assessment Of Government Spending Austerity Measures in On-Site School Support For Curriculum Delivery: A Case Of Idutywa Education District” is the bonafide record of work carried out by Nomachule Lombo for final year Masters of Public Administration at the University of Fort Hare. This work has not been submitted in part or in full for any degree to any other university.

Signed:

Nomachule Lombo

Place: East London

Date: January 2016

Dedication

This work is dedicated to:

- My family: Siphon, my husband, Nqobile and Lwazi, my daughters, for their love and concern for my progress. They are dear to me.
- My mother, Cynthia Thembekile Saphula, uMambanjwa, who passed on two months before I completed this work, for her love for education.

ABSTRACT

The view of on-site school support for curriculum delivery is shared by most countries and its effects have been felt by schools. There is fear that the Austerity Measures will negate the outcomes of the action taken by the teams that visit the schools. The reviewed literature is more biased towards the Austerity Measures in the whole government sector rather than in a department or an institution like the Education District in Idutywa. Even though the effects of Austerity Measures have been researched all over the world based on a specific country, there is deficiency of such literature done in the institution like the department of Education Districts. The researcher intends contributing to the filling of this gap by this study.

The researcher therefore carried out a focused study of the effect of Department's Austerity Measures on on-site school curriculum support in Idutywa Education District. It is also imperative to know how the teachers are affected by these departmental Austerity Measures, hence the interviews were carried out with the school personnel in addition to the District Professional staff. The District is characterised by poor performance in both Annual National Assessment (ANA) and the final National Senior Certificate results. The findings revealed that the implementation of AM have contributed to, amongst other things, the following issues:

- The inadequate on-site school support for curriculum delivery;
- The shortage of resources that includes teachers and vehicles;
- and ultimately the learner underperformance

The researcher expect that the recommendation made will be embraced and be factored through, during the planning process of the Eastern Cape Department of Basic Education in order to improve learner performance.

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List of Acronyms

Acronym	Meaning	Acronym	Meaning
ECD	Early Childhood Development	AET	Adult Education & Training
HOD	Head of Department	ECDBE	Eastern Cape Department of Basic Education
IDS&G	Institutional Developmental Support & Governance	ESSS	Education Special Support Services
MDG	Millennium Developmental Goal	IOM	Institutional Operations Management
DBE	Department of Basic Education	NDP	National Developmental Plan
GET	General Education & Training	DoE	Department of Education
CES	Chief Education Specialist	DCES	Deputy Chief Education Specialist
SES	Senior Education Specialist		

CHAPTER 1: INTRODUCTION TO THE STUDY

1.1 Background motivation for the Research

Coates (2012:5) defines Austerity Measures as attempts to significantly reduce government spending in an effort to control public-sector debt, or to bring down overspending in an entity. The amount of money that the government spent on salaries from 2007 to 2011 rose by 60% to R43 billion (Joubert 2014:2). This has put much pressure on overall government spending.

Due to this overspending on the Compensation of Employees, the Eastern Cape Department of Basic Education (ECDBE), imposed Austerity Measures. The funds that were allocated to each programme in the Department got cut and also a protracted bureaucratic procedure for the procurement authorisation process was introduced. These measures hit hard on the District activities which among other things is to do on-site school support- that means they must support and monitor the schools' functionality as well as curriculum delivery. To carry out these activities, the Circuit Managers and the Subject Advisors must periodically visit schools. The working tools such as transport, printing material, laptops, and teacher provisioning and other things that must be provided to these officials are essentials. Without these items, on-site school visits are less effective.

The purpose of conducting on-site school support visits is to:

- Provide support to teachers for continuous growth and development.
- Identify successes and challenges in the implementation of the National Curriculum Statement (NCS).
- Ensure quality school-based curriculum development that will culminate in quality teaching and learning.
- Contribute to the process of evaluating teachers' performance and to promote accountability (Provincial Curriculum Guidelines, 2007:2).
- Monitor curriculum coverage.
- Ensure functionality of the school and manage vacancy rates.

The ultimate goal for the on-site school support for curriculum delivery is to improve learner performance in all grades. The inability of District officials to visit schools will have negative ramifications because they will not be able to carry out some of the above mentioned activities.

Teachers will implement the National Curriculum without any guidance. The challenges experienced by the schools may escalate and schools may end up dysfunctional. This may lead to high failure rate, increased rate for learner drop-outs, which may further lead to unemployable youth.

Government Gazette Notice 180 (South Africa 2012:10) clearly stated that “the minimum standard for a Subject Advisor could be two visits per school per term”, to support curriculum delivery. This will on a greater extent be aided by the availability of the working tools.

The first mention of the Austerity Measures in the Eastern Cape (EC) Budget Speech was in the 2009/10 financial year which was after the global economic downturn. A report by the International Monetary Fund (IMF) for a G20 meeting in November 2009 revealed that, amongst other things, financial conditions have continued to improve, but are still far from normal and global economic recovery is expected to be slow. South Africa and the Eastern Cape have not escaped the effects of this global recession (Provincial Treasury 2009/10).

On-site school support ensures future planning, ensures that the subject co-ordinator has an overview of the teaching of their subject throughout the school, through which they can support staff, develop the subject and ensure adequate resources are in place. The educator needs to meet the requirements set out within the Provincial curriculum framework.

In 2014/15 budget allocations in the ECDBE, were cut by 28% across the board. During the second quarter of the same year, another budget cut got implemented. Some programmes end up with close to half the amount that was previously allocated. This leads to halving the activities that were planned. That is, the total amount of services that were going to be delivered to the clients, which is the learners, will be halved.

The Idutywa education District performance dropped from 60.8% in 2013 to 57.9% in 2014. For the past 7 years the District performance has been below 70% which is the national benchmark of the matric pass rate.

This raises a question about the impact of these Austerity Measures in service delivery. Do they achieve the intended goal or do they deprive the quality education as envisaged in the

goals of the DBE which is, “quality education for the children of the Eastern Cape/South Africa.”? This is still to be determined by the researcher.

The Austerity Measures commonly known as the ‘belt tightening measures’, date back to the 19th century. In the U.S, the state declared compulsory salary levies, particularly to fund the war in 1812, and the Civil War, but those taxes were moderately low and chargeable levels of salary were high. The case was exacerbated by the economic effect of First World War in April 1917; amongst the first belt tightening control was a rise in the salary tax to a highest real rate of 77%. The state restricted food manufacturing and supply with the aim of cutting local intake (Davis 2013:1).

In terms of South African National Treasury Instruction 01 of 2013/14 on Cost Containment Measures, the ECDBE, has amongst other responsibilities to control the kilometres (km) travelled by government’s car and scheme vehicles per month. The maximum km travelled per vehicle must not exceed 3 125 km irrespective of the geographical location of the Education Districts. Some schools are in a radius of more than 190 km away from the District. With the imposed Austerity Measures, servicing those school becomes minimal.

The researcher’s interest is to find the impact of these Austerity Measures to the on-site school support in curriculum delivery to the District officials and subsequently the learner.

1.2 Statement of the problem

The Austerity Measures seem not conducive to achieving objective of improving education and training as the requirement in chapter nine of the National Development Plan’s (NDP) Education Vision 2030.

The main research statement of the problem is to study how government spending Austerity Measures affect on-site school support for curriculum delivery.

1.3 Related questions

In 2014/15, the total initial budget for education department was R26.3b and after the additional of rollover adjustments, it went up to R26.8b. 90% instead of 80% of this budget goes to the

Compensation of Employees and the rest is for Goods and Services (G&S). 5% of the G&S budget was top-sliced before it even reached the department reserves (Annual Report 2013/14). The Treasury keeps on regulating the ECDBE budget up to the point where correct ratio is achieved. This is done, amongst other things, by imposing the inevitable Austerity Measures.

The author will research the impact of these Austerity Measures on the Idutywa Education District and the following related research questions are to be explored:

- What is the effect of government spending Austerity Measures to the Idutywa employees?
- What is the effect of government spending Austerity Measures to the on-site support of the curriculum delivery in the Idutywa schools?
- How do government Austerity Measures affect the learner outcomes?
- How can they be managed?

1.4 Objective of the research

- To investigate how the implementation of Austerity Measures affect the District employees.
- To establish how the Austerity Measures affect the on-site support of the curriculum delivery in the schools.
- To find out how the imposition of the Austerity Measures affect the learner outcomes in the District.
- To recommend strategies and methods to manage Austerity Measures.

1.5 Significance of the study

This study would have policy significance. The ECDBE Policy developers need to move away from a decision based on the “blanket approach” where Districts are treated in the same way even when affected by different contexts. The Provincial Office must look at the strength of each District and determine whether the resources are managed effectively, efficiently and economically. This is the plain morals and ethics rooted in Section 195 (1) (b) (Chapter 10) of the Constitution of SA, 1996 which states that the nation’s wealth must be maintained effectively, economically and efficiently. The question that this research is probing is whether

the District employees, where the budget is cut to the bone, are still adding value to the system or have they become a liability.

From the literature that the researcher has reviewed to date, findings are that there has been little research undertaken with regards to Austerity Measures policies in the departmental sectors. What has been researched quite extensively are the Austerity Measures which relate primarily to the whole government sphere. There has been little discussion relating to the specific sector such as Education District. Thus this research will be exploratory in nature. It will also direct the education planners to the issues pertaining to Idutywa District and its schools. It will research an issue on which little previous work has been carried out. It will also reveal whether the problem exists or not. Therefore, any research on Austerity Measures in the departments will most likely result in an additional contribution to knowledge.

The study will benefit the education strategic planners, the Treasury – when making regulations, professional, policy analysts and corporate services in the department. Each role player will be conscious of the decisions made and their consequences.

The study will also promote the correct strategy in the budget appropriation for each District. It will also provide the empirical evidence on the necessity for inter-sectional and integrated planning. The research will highlight how these measures affect policy making and implementation.

1.6 Rationale of the study

Mauch and Birch (1989) cited in Gray (1996:9) constructed questions to guide researchers which among others, highlighted these two:

1. Is there a topical attention given to the Austerity Measures in the Public Administration?
2. How well has the ‘Austerity Measure’ areas been researched? Is there a knowledge gap?

The area of research chosen (a sector instead of the whole government sphere) has been under-researched and is therefore a valuable resource waiting to be explored further. In this research

the focus is more to the workers and beneficiary - the leaner. There is more literature on the countries' effect of the Austerity Measures and very little on a specific sector like education District.

Problem question must be related to current issues and evaluate specific practice at a given site. The following Treasury instruction attests to that In July 2014, the National Treasury had instructed the ECDBE's Superintendent General to cut R200m from the Learner & Teacher Support Material (LTSM) budget (Treasury instruction No.3, 2014/15:1); one million rand must be used towards the employment of teacher and the other one towards the provisioning of school furniture. That will result into some schools not having the quantity and also quality of the LTSM they require. The effect of these kind of instructions and more, still needs to be researched.

While the proposal is not a new line of inquiry, it is a more focused – small sector scale of research. The researcher here will identify the practical ramification by conducting empirical studies that account through practical interviews.

1.7 Literature review

Literature review simply means reading the literature related to the topic of interest. It presents a scientific argument to show the need for the research (McMillan & Schumacher 2010:4). When doing the literature reviews, the purpose of the literature reviews, the literature sources and the reviewing techniques must be kept in mind.

Johnson and Gill (1997:6) stated that the research project demands analysis of what has been researched on the issue and gather together in a critical assessment which determines some consciousness of the existing state of information on the issue, its confines and what the analysis intentions to add to the existing knowledge.

From the literature that the researcher has reviewed to date, it is evident that there has been little research undertaken with regards to Austerity Measures in a government entity. What has been researched quite extensively is the effect of Austerity Measures which relate primarily to the government as a whole.

Chandler (2004:1) asserts that reviews allow the researcher to acknowledge different contributions and also encourages both negative and positive responses so that one can build on top of what already been there. From 1936-37 Colonel David Toro, introduced the Austerity Measures to nationalise the holdings of U.S.-owned Standard Oil among other measures (Bolivia profile 2006:2).

Shelly (2009:10) argues that hindrance of on-site school support due to Austerity Measures will deprive the school because nothing can be a substitute for first-hand knowledge, that is, a visit to the school during "working" hours. International financial institution such as International Monetary Fund (IMF) may require Austerity Measures as part of Structural Adjusting plan when acting as a last resort lender.

David Toro cited in the article 'Federal Research Division Country Profile', (Bolivia report 2006:8) stated that austerity policies may be attempts to demonstrate governments' fiscal discipline to their creditors as well as credit -rating agencies by bringing revenues closer to expenditures. They may also be politically or driven by ideology. More recently austerity has been implemented after governments became highly indebted.

According to modern monetary theory, Austerity Measures by a state are generally counterproductive because neither taxation nor bond issuance acts as a funding mechanism for the government. Modern Monetary Theory can be defined as a way of doing economics that incorporates a clear understanding of the way our present-day monetary system actually works. (Pierce 2013:9). A distinctive objective of austerity is to reduce the annual budget deficit without forfeiting growth. (Matthews 2012:7)

During the war in the USA, the austerity methods forced by the state included limiting of major items, limitations on travelling, froze costs and other fiscal restrictions (Davis 2013:9). One of the roles and responsibilities of the Districts is support - thus providing an enabling environment for schools to do their work in line with education law and policy (Government gazette SA 2012:18)

1.8 Theoretical Framework

Smith (2008:5) stated that theoretical framework positions the research in the discipline in which one is working. It enables the researcher to theorise about her research and make explicit assumptions about the inter-connectedness the way things are in the organisation. A framework is a structure that defines the perspective taken thereby data collection for the study. It is composed of the ideas, concepts and abstractions that enclose and support the investigation or research (Eisenhart 1991:202).

The theory that underpins the Austerity Measures is the Keynesian economic theory. The proponent of this theory is the British economist called John Maynard Keynes during the 1930s in an attempt to understand the Great Depression.

Keynesian economics is a theory of total spending in the economy (called aggregate demand) and its effects on output and inflation. An economic theory of total spending in the economy and its effects on output and inflation. Keynes advocated increased government expenditures and lower taxes to stimulate economic growth during the economic downturn. Keynesian theorists believes that if the demand for goods and services is increased during the economic crisis, the economy will be pulled out of depression. Subsequently, the term “Keynesian economics” was used to refer to the concept that optimal economic performance could be achieved and economic slumps prevented by influencing aggregate demand through active stabilization and economic intervention policies by the government.

Keynesian economics is considered to be a “demand-side” theory that focuses on changes in the economy over the short run. Prior Keynesian theorists, the classical theories held the view that the economics markets are controlled by the aggregate demand of supply of goods and services. Thus the interference of state is not necessary. Austerity traditionally has been defined as the economic policies surrounding deficit cutting.

From the review on the theoretical framework, the researcher’s theoretical analysis will be based on the interpretation of the data and facts which will be presented in a coherent manner. Verma and Beard asset that, a theory is an essential tool of research and it further stimulates the advancement of knowledge.

1.9 Research Methodology

Research methodology is defined as a scientific procedure whose objective is to provide answers to problems through methodical styles with the backing of reliable facts. It concentrates on the inquiry method and the types of tools and techniques to be used (Kumar 2011:23).

Mouton (1998:37) distinguished between three stages of the procedural dimension of study, viz.:

- methodological archetypes, the best intellectual level which include the difference between qualitative and quantitative research;
- research approaches, this refers to the approaches which are used in certain phases of the study process and they include sampling, collection and analysis of data;
- lastly, the techniques of research, which characterise the most tangible level of the methodological aspect and comprise specific procedures related to sampling, collection of data and the analysis of data. All these are helpful in forming a better understanding of the concept of research methodology (Rakate 2006:21).

There are two major types of research methods namely: quantitative and qualitative. The fundamental dissimilarity between the quantitative and the qualitative designs is that the results of the quantitative research are presented with statistics, whereas the qualitative researcher uses words to define phenomena (McMillan & Schumacher 1993:40). The difference between the qualitative and quantitative methods is not just that of quality, but rather that of procedure.

In this research the author will use qualitative research method because a survey through the use of questionnaires and interview will be done. The researcher will conduct personal interviews using open ended questionnaires. The personal interview method is very flexible and can be used to collect large amounts of information. The questions must be prepared in such a way that they hold the respondent' attention. The researcher will be available to clarify difficult questions and will guide interviews, explore issues, and probe as the situation requires. Personal interview can be used in any type of questionnaire and can be conducted fairly quickly (Research Methodology 2008:5).

The basic concern of qualitative research is to accomplish people's own interpretations of state of affairs and occasions, and with presenting their viewpoints and emotional state (Hakim 2000: 80). The primary goal of the researcher using qualitative research approach is to define, describe, interprets and comprehend the effect of the Austerity Measures to the on-sight school support of the curriculum delivery by the District officials.

1.10 Advantages and disadvantages of qualitative data

1.10.1 Advantages

- It provides depth and details: that is, it goes deeper than just investigating ranks and counts by recording attitudes, feeling, and behaviour;
- Create sincerity: inspiring respondents to be broad on their responses and may lead to opening up of new topic areas that were not initially considered;
- Respondents' individual experiences are stimulated when using the qualitative data method : a thorough picture can be built up about why people behave as they do and how they feel this can be determined about their behaviour;
- It is an attempt to evade judging before all facts are studied.

1.10.2 Disadvantages

- Due to vastness of population, fewer people are sampled: the researcher spends more time in collecting data than quantitative data collection and the amount of sample used depend on the availability of funds.
- It is not easy to generalise. Frequently, the actual figures are reported instead of percentages;
- Systematic comparison-making is a challenge: because people may give generally highly subjective responses that tend to contradict each other.
- It is reliant on skills of the researcher: mostly in the instance of interviewing people, focus groups and during observation.

1.11 The target population

Burns & Grove (1997) define the target population as the entire collection of respondents with the selected set of conditions. This simply refers to that group of selected individuals that the researcher depends upon to obtain information during the research study.

The population of the research will be the Idutywa Education District officials who are responsible for the delivery of curriculum to both secondary and primary schools. This population is composed of the fifty –five (55) Office based educators who holds positions of the Chief Education Specialist (CES), Deputy Chief Education Specialist (DCES) to the Senior Education Specialists (SES). All these officials are responsible for the on-site school support. The population will also include twenty-two (22) schools that performed below 60% in the final Matric results in 2014 because there are planned programmes that are focusing at these schools.

The population, sampling and sampling technique that will be employed in the study are presented below. Marie (1997:4) states that population and sampling determine where and from whom data will be collected. With scientific research the aim is at the description of the kind of a population, a collection of subjects or variables that cannot be examined due to time and resource limitations. It is for this reason that the researcher will follow the norm by taking a sample to represent the entire population.

The current position of the Idutywa District is that it faces challenge of poor learning outcomes. It only reached 60% mark for matric pass rate in 2013 during the past six years. It went below 60% again in 2014 matric performance. Even though the whole department is involved with activities to improve learner outcomes, the researcher will focus on the Idutywa Education District officials who are directly involved in curriculum delivery in schools in the District and are also badly hit by the Austerity Measures.

1.11.1 Sampling Techniques / Methods

Sampling in this study will be the professional officials from the Idutywa Educational District who are directly involved with the on-site school support for curriculum delivery. This will be a concrete way of gathering data when the population is exceptionally large. Bless & Higson-Smith (1995) claimed that the most important principle to use when determining the scope of

a sample is to perceive to what degree the sample is expressive of the target population. The sample of this study will be as follows:

- The Chief Education Specialist – ESSS;
- The Chief Education Specialist – Curriculum;
- The Chief Education Specialist – IDS&G;
- 10 Subject Advisors;
- Three Circuit managers and
- 5 Educators

This will constitute 21 respondents.

There are three Sampling techniques which includes probability, non-probability and mixed sampling. The researcher will use probability technique. In the Probability sampling design every component in the population has an identical and free instance of being chosen in the sample. The Idutywa District officials have equal chance to be selected. They are affected by the Austerity Measures and are all responsible for the learner performance.

1.12 Ethical Considerations

Ethics in research may be defined as the distinguishing norms for conduct that is morally acceptable. It is a product developed by the scientific community over years that depict a conduct which is acceptable and not acceptable in research which are enforced through professional association, institution and agencies.

The University has set up a structure that must be complied by the students for the research ethical clearance. The researcher will ensure that these processes and procedures are followed to seek out the ethical clearance certificate. The ethical issues of concern in research include among others, informed consent, appropriate concern for vulnerable group, privacy and confidentiality.

Cooper and Chandler (2003:120) argued that the objective of ethics in research is to safeguard every respondent from any form of negative consequences caused by the research doings. That is, all partakers in the activity of the research should use ethical mechanism. Though, there is

no substantial method to ethics owing to unanticipated situations put on the researcher therefore the consent and confidentiality of the participant is maintained.

Concerning the principled contemplation, the scholar needs to make sure that the partakers provide their informed consent. It must be taken into consideration that participants fully comprehend the contextual and the purpose of the study. The participants must clearly know what is expected of them when they interact with the questionnaires or interviews.

The Macmillan Dictionary interprets 'Permission' as the right to do something that is given to you by someone in authority. The researcher must obtain permission from the ECDBE's Head of Department and the District directors to conduct a research in their institutions.

The researcher in this study will strive throughout the study to be honest, objective, empathetic and considerate towards the participants. The participants will be guaranteed that should they want to be removed from the research whenever they feel uncomfortable, they will be permitted to do so without any penalty or victimisation. They will also be protected from any form of abuse that has to do with the study.

1.13 Scope of Limitation

The researcher will conduct a study on the effect of government Austerity Measures as administered by the ECDBE entity. The scope of respondents will be the District Officials who are directly responsible for the service delivery in the schools namely: Chief Education Specialist, Deputy Chief Education and Senior Education Specialists.

1.13.1 The study will be affected by the following limitations:

- There will be a time - delay; since the researcher is a full time employee of the Department of Education with a lot of responsibilities. The respondents are field workers and managers who are mostly out of the offices attending to various meetings in the District or at Head Office.
- The researcher has limited her scope of research to the District officials and few educators whereas the service delivery or failure thereof is felt by the schools and

ultimately learners. This is because of the geographical vastness of the Province and the rural nature of the District.

- There is not much literature for referencing. The literature reviews sources were more on articles and websites than there are in books. As a result, this study is limited by the availability of written material.

1.14 Clarification of concepts and terms

Public Administration

Walter (1972) defines Public Administration as the universal process of efficiently getting activities completed with and through other people. However, the researcher agrees with Ijeoma (2013) who simply defines Public Administration as the running of state matters to realize the mutual nobleness of the people.

State's austerity

Cowen (2012) asserts that in Economics, austerity is a policy of reducing deficit, minimizing spending, and a decreasing in the quantity of assistances and state facilities provided.

The definition of Austerity Measures as a cost containment measure will be preferred for the sake of this research. These are measures that are imposed by the government when there is an economic down turn or a slow economic recovery after recession. In the Department, these measures result into the reduced or stoppage of spending in some planned activities. The officials become 'grounded'.

Budget cuts

While reduced spending usually happens at the planning stage of the next financial year, budget cut in this research, implies sudden unexpected cuts that are announced at any time during the implementation of the plans.

Management

Management comprises those persons responsible for planning, directing and controlling activities of the entity, including those charged with the governance of the entity in accordance with legislation, in instances where they are required to perform such functions (PFMA of 1999 updated 2014).

Entity

An entity is an institution that prepares and presents financial statements under accrual basis of accounting standard. The entity controls significant public resources and operate to provide a wide variety of goods and services in different geographical areas with differing socio economic characteristics. They also required to use allocated resources efficiently and effectively to achieve their objectives (PFMA of 1999 updated 2014).

1.15 Preliminary Framework for the Research

Chapter 1: Introduction and Conceptual Background

This chapter will introduce the topic of the research, the background, theoretical outline, statement of the problem, main study question as well as related research questions. The researcher will also sketch the objectives, the purpose and the significance of the research.

Chapter 2: Literature Review

This chapter will deal with the broad outline of the literature relevant and applicable to the government Austerity Measures will be reviewed. The researcher will formulate a statement that will form the basis of the review. The chapter will also discuss what other researchers are saying about the topic or topics related to the government Austerity Measures.

Chapter 3: Research Methodology

Chapter 3 outlines the methodological approach used in this research study, research design and research tool and justifies how these were selected. Ethical consideration will also be discussed. It will also detail how data will be collected in order to arrive to a certain conclusion in this study. The research site will be chosen.

Chapter 4: Data Presentation and Analysis of findings

Chapter 4 will present, interpret and analyse data. The raw data will be placed into logical, meaningful categories or themes and be presented in tables and graphs. Analysis of findings will be discussed and be linked to the literature reviewed then some conclusions will be drawn.

Chapter 5: Conclusions and Recommendations

Chapter 5 will present a summary of major findings, recommendations to address the challenges due to the Austerity Measures, strengths and limitations in this study as well as some suggestions for future research in government (department) Austerity Measures and then the conclusion.

CHAPTER 2: LITERATURE REVIEW

2.1 Introduction

In this chapter, the broad outline of the literature relevant and applicable to government Austerity Measures will be reviewed including the discussion of the theory that underpins this research. The review will include the government Austerity Measures imposed in other countries and in South Africa. The literature on the Austerity Measures in the education institutions will also be looked at. The chapter will also discuss what other researchers are saying about the effect of the Austerity Measures in on-site school support for curriculum delivery and other views related to the government Austerity Measures. Other authors' ideas will connect to the topic in the sense that they are about the constrictory measures that the government resorts to during or in anticipation of the economic downturn.

Then lastly the researcher will identify what remains to be done in this area of study, that is what hasn't been written yet, and state briefly how the study will help fill that gap in the literature.

2.2 Theoretical Framework

When conducting research, in the sciences of humanities, a conceptual or a theoretical framework or guideline to investigate, interpret and solve particular problems is required. A theoretical framework generally provides the criteria to determine what counts as a problem and the steps necessary to solve the problem (Theoretical Framework 2015:4). The theory that underpins this research is the Keynesian economic theory whose proponent is the British economist called John Maynard Keynes. He became a scholar during the 1930s as he attempted to understand the Great Depression.

Keynesian economics is a theory of total spending in the economy (called aggregate demand) and its effects on output and inflation. Keynes advocated increased government expenditures and lower taxes to stimulate economic growth during the economic downturn. Keynesian theorists believe that if the demand for goods and services is increased during the economic crisis, the economy will be pulled out of depression. Subsequently, the term "Keynesian economics" was used to refer to the concept that optimal economic performance could be

achieved and economic slumps prevented by influencing aggregate demand through active stabilisation and economic intervention policies by the government. Keynesian economics is considered to be a “demand-side” theory that focuses on changes in the economy over the short term. Prior to Keynesian theorists, the classical theories held the view that the economics markets are controlled by the aggregate demand of supply of goods and services. Thus the interference of state is not necessary. Austerity traditionally has been defined as the economic policies surrounding deficit cutting. The Department of Basic Education has imposed these Austerity Measures with the aim of reducing the skyrocketing spending on the compensation of employees and payment of accruals.

The view of the Neoclassical differs from both the Keynesians and the Classical theorists in that for economic growth to take place, the government must reduce spending and resources must be privatised (Midgley 2014:12). In this way the Neo-classicists are in favour of the Austerity Measures. Midgley (2014) further stated that Neoliberal economic theorists are famously known for sneering government intervention in the economy, precisely because they trace their foundation to a period when markets were seen not just as a source of better economic outcomes, but as a weapon to challenge concentrated political power.

The study by Blyth (2013) reveals that the concept of austerity emerged in the 20th century, when large states acquired sizable budgets. However, Blyth argues that the theories and sensibilities about the role of the state and capitalist markets which underline austerity emerged from the 17th Century onwards. He traces the study of Austerity Measures back to Adam Smith theories on economic growth and taxes.

2.3 The effects of Austerity Measures in the countries outside South Africa

"Austere" means "strict or severe in discipline". Manual (2015:1) therefore defines Austerity Measures as strict measures that are undertaken by a government to help bring expenditures more in line with revenues. The most common example of Austerity Measures occurs when a sovereign government's bond rating is downgraded. This makes borrowing more expensive, and usually forces the government to impose these new measures. The researcher will highlight how the economic downturn that, for the last five years, has been putting pressure on the European countries such as Greece, Bolivia, Ireland, USA and Europe has affected South Africa and down to the Eastern Cape Provincial Education Department.

2.3.1 Austerity Measures in Greece

Due to the 2009 Economic crisis Greece was forced to make enormous cutbacks to meet the terms of bailout packages, totaling to €240 billion (equivalent to R3 226 billion), offered by the European Commission, the European Central Bank and the International Monetary Fund, also known as the Troika. (*Troika is a Russian word meaning a set of three or three of a kind*). To date Austerity Measures have not taken Greece out of debt.

In response to this crisis the austerity programme sets several conditions and borrowing terms such as the reduction of public spending in various sectors such as health, pensions, and education. The experts maintained that Austerity Measures imposed by the Greek government since the economic crisis have inflicted “dreadful” harm on the services of the population, leaving nearly a million people without access to healthcare and quality education. Amongst other threats caused by Austerity Measures is the decrease of quality student support in schools.

In Greece the funding is allocated in terms of the economic conditions of the students. The weighted funding formula takes into account the tuition cost of the disadvantaged students. Importance is placed on the support to most disadvantaged students. Available resources and the way they are spent influence students’ learning opportunities. To ensure equity and quality across education systems, funding strategies guarantee access to quality early childhood education and care (Quality in Education 2012:7).

The main aim of support for schools in Greece is to improve the quality and equity of education and to strengthen and support school leadership. The support also stimulates a supportive school environment and climate for teachers and learners. The imposed budgetary constraint was challenging for the country and has resulted into increased unemployable youth. It is stated that Greece has a higher than average dropout rate, with 25% of 25 to 34 years-old not having completed upper secondary education, compared to 19% across Organization for Economic Co-operation and Development (OECD) countries (Quality in Education 2012:20)

In the current economic crisis in Greece, the funding for education has been reduced. Spending in education was going to be reduced by closing or merging 1,976 schools Durden (2011). This led to reduced school support programmes. These support programmes that were offered led to improved learner performance mainly from the disadvantaged underperforming schools.

With the minimal support there was an increased learner dropout rates in the secondary education phase. Youth unemployment has increased and unemployment rates are higher for those without upper secondary education. Improving on-site school support can lessen school failure to perform optimally (Asderaki 2011).

2.3.2 Austerity Measures in Bolivia – South America

Way back in the 1930s Colonel David Toro, introduced the Austerity Measures to nationalise the holdings of U.S. - owned Standard Oil among other measures (Bolivia profile 2006). The global economic crisis led to a number of countries including Bolivia to rely on international aid. This influenced the domestic decision-making of each country and the bodies like the International Monetary fund, European Central Bank and The European Commission called for cost constraints in financing even in education. The effect of the Austerity Measures in Bolivia is especially interesting because it launched Educational Reform in 1994 and huge progress was made in the field of education since then (Richardson 2012).

However, it has been placed among critical countries which are likely to experience times of great uncertainty regarding education due to the cost cutting measures. For the first time in 2007-09 it recorded 5% decrease in development index. Richardson further argued that beyond the crisis and the concerns of external agents, there are structural and historically rooted inequalities of the educational system which still present important weaknesses but the support for teaching and learning is still key to the Bolivian government.

Although the impact of the crisis and adjustment on education and training have in many cases been sharply negative, there have also been attempts to respond positively to these challenges. The central government ministries of education and labour and training institutions may pursue different courses of action. In practice, some of those responses have been proved more successful than others in maintaining the provision of education and training and preserving the capacity to meet changing education and labour market demands.

2.3.3 Austerity Measures in Ireland

Ireland is one of the European countries that is receiving assistance from the troika loans. By May 2012, it had already received five budget cuts since 2008. This has forced Ireland to raise

taxes and cut wages. Taxes have gone up to 23% and the wages has been cut by up to 15% (Rigney 2012:11). There has been also a massive cut on education at all levels. Reduction in salaries, restriction on recruitment, increases in class sizes and reduction in capitation grants have hit all sectors and various projects such as teachers support, development training and others that are supported by other departments have been affected (Richardson 2012).

In addition to the cuts suffered by all, charges have been introduced for school transport and pay cuts for support services such as school secretaries, caretakers and cleaners were introduced. There was a reduction in the services for transporting of children, newcomer children and disadvantaged children generally. The cuts affected the numbers of Special Needs Assistants and in National Education Psychological Services. Richardson (2012) asserts that assessment of the effects of Austerity Measures is not measurable only in terms of cuts in resources and limitation of opportunities for learning, jobs and personal development but also in terms of loss of morale for both individuals and their communities.

2.3.4 Austerity Measures in the United Kingdom (UK)

Ever since the economic crisis, due to the government Austerity Measures the target support for children between 2009 and 2013 in the UK fell by 21%. The education departments have to develop multi-disciplinary teams to deal with learner, teacher and needy families support in the schools. It became a common practice to find registered nurses, professionally trained informal and community educators and youth workers as well as counsellors in one school.

Bradshaw and Main (2014) cited by Smith (2015) have argued that, 'The burden of austerity has fallen particularly heavily on children even though there is no data to provide a full analysis of the impacts of this, but the evidence they do have suggests worrying trends'. Their argument is based on the United Nations' Children Education Fund (UNICEF) (2014: 2) review of the impact of the economic crisis on child well-being in rich countries which concludes that there is a 'strong and multifaceted relationship between the impact of the Great Recession on national economies and a decline in children's well-being since 2008'. They continue their argument by saying that children are suffering most, and will bear the consequences longest in countries where the recession has hit hardest. The child poverty and learner dropout rate have increased in most countries. Feelings of insecurity and stress on the part of children and young people, have risen in many countries. There is still a forecast that schools in the UK will face a major

cut in the near future and they argue that this may lead to falling standards of education (Smith 2015).

Even the supporting programmes for people with disability were not spared in the implementation of the austerity measure programmes in the UK. In one of the findings mentioned by the European Foundation Centre (EFC) 2012 was that a wide range of Austerity Measures which had a significantly negative impact on services for people with disabilities were identified. There was a direct budget cuts in the following items in various areas: fees for early intervention services were reduced from €240 to €160 per child in Portugal; cuts of between 15% and 23% were made in direct funding to social service providers in Ireland; the financing of disability organisations in Spain decreased by 20% while public funding was cut by 30% between 2011 and 2012 for disability organisations in Portugal. In Italy, public expenditure cuts included the cancellation of the National Fund for Dependent People worth €400 million EFC (2012:9)

2.3.5 The Canadian Government view to Austerity Measures

Mike Coates (2012) gave an argument as to why government austerity measure are a good thing during the economic crisis. He stated that the economic crisis offers governments an opportunity to trim bloated budgets and to make preparations for the long term benefits. Whereas the economist, Keynes asserts that the Austerity Measures must be effected during the economic boom not the downturn. Canada is one of the countries that keeps on fighting for austerity because they argue that the government find it too difficult to make major reforms when time are prosperous and there are corporations, individuals and other levels of government that build in government entitlement programs as part of their annual budgets.

He cited the words of US President Barack Obama 2008 when referring to the economic crisis as “a once-in-a-generation chance to act boldly, to turn adversity into opportunity, and use this crisis as a chance to transform economy for the 21st century.” Harper, Canadian Prime Minister, supports the view that the world crisis presents the government with its best opportunity to put in place serious structural reforms necessary to ensure long-term prosperity. Education challenges faced by the Canadians have a lot to do with the discrimination of the First Native people and the difficulty to getting the Post-Secondary education (PSE). There are no education issues of Austerity Measures because they are implemented on a positive note.

2.3.6 Washington DC – North America

Appelbaum (2013:5) stated that the Washington federal government, the nation's largest consumer and investor, was cutting back funds at a pace that exceeded the last half-century after the Vietnam War and the cold war. The reductions are designed to be indiscriminate, cutting everything from air traffic control to nursery schools. It was also stated that the Austerity Measures are going to kill the government jobs. Based on the above statement, Yellen (2013) cited in (Webber 2013), maintains that sometimes the discretionary measures often helps the economy to recover.

Applebaum further argues that the lessening of government spending is a normal response to an extraordinary situation. Government spending generally rises during recessions and falls as the economy recovers. Scholars notes that government cutbacks may cause short-term pain, but also tend to provide long-term benefits. The same arguments may apply to funding appropriated to education.

2.3.7 Challenges in teacher support in Tanzania

It is the opinion of Sumra and Rajani (2009) that the teacher support in Tanzania became a challenge due to underfinance in education despite the donor funding from other countries such as British, France, Ireland, Japan, Norway, Finland, Canada, Holland, Germany, China, Turkey, Algeria, India, Poland, Egypt, Pakistan, Belgium and European Union (EU) which help the financing of education. The Tanzanians education policy stated that there will be no financing that belongs to Education but it will be shared between government, communities, parents and end-users. There is a call for an urgent need to strengthen the standards of teaching in both primary and secondary schools, and to bring back (as they say in Tanzania) “the respect of the profession”.

Sumra and Rajani (2009) maintain that in Tanzania there is huge number of teachers who are qualified in paper but that does not transform into quality teaching and learning hence there is an urgent need to strengthen support and monitor effective teaching. Reduced funding inhibit this important activity. In the ECDBE (South Africa), there are qualified teachers who find it difficult to teach other areas in their subjects (they have content gap). These are the ones which need support from the District Officials.

2.3.8 Austerity Measures in the developing countries

In their working paper, Ortiz et al. 2011, compares the reaction of the developing countries in terms of government spending in three periods of the global economic crisis. About 70% of these countries effected fiscal contraction from 2010 and there was an indication that by 2012 about one quarter of developing countries will undergo excessive contraction. (Ortiz et al 2011:9)

Kyrili and Martin (2010) find that two-thirds of 56 low-income countries surveyed cut budget allocations in 2010 to one or more pro-poor sectors, which include education, health, agriculture and social protection. They further confirm that while expenditures on infrastructure, health and agriculture rose in 2009, they fell in 2010, with social protection allocations contracting in 2009-10 and ending the period more than 0.2 percent of GDP lower than in 2008, on average.

The wave of fiscal consolidation that took hold of developing countries had severe consequences for vulnerable populations. Even though the expenditure data project contraction which further intensify during 2012, spending contractions are not inevitable. In fact, there are a number of areas that governments, even in the poorest countries, can explore to boost investments in economic and social development nowadays. Not only can these viable options counter the intensifying drive toward austerity, but they can provide essential support to children and poor families when they are most in need, thus ensuring that economic recovery is truly a recovery for all (Ortiz et al 2012: 23).

The General Education Modules (2000: 48) of the Southern African Development Community (SADC) outlined the importance of on-site school monitoring and support as means of helping the learners to maximise the gains from their learning experience. It assist teachers to sharpen their teaching skills, improve their delivery methodologies, develop their leadership skills and qualities, upgrade themselves professionally and academically and ensure goal achievement. The Department of Education officials assess the learning materials and ensure that they are user-friendly, relevant to teaching and learning, adequate and appropriate to the educational level, and are available. They also look at the teaching methods and assess if they are meeting the level of a child, are interactive and integrated.

2.4. The context of South Africa

2.4.1 Legislative framework

In South Africa the District officials need to ensure that the planning in schools is based on the National Education Policy (1996). This policy identifies roles that should be performed by the teacher and be managed by the School Management team. The measuring of the schools' performance is based on the execution of these functions.

The declaration by the South African Schools Act (1996) is that the Minister of Education must determine the national curriculum statement indicating the minimum outcomes and standards, and a national process and procedures for the assessment of learner achievement. The District officials must ensure that the schools are in compliance with this act by means of continuous on-site school monitoring.

Schools' planning must also be based on the national curriculum policies which include Education White paper 1 on Education and Training, Education White Paper 6 on Special Education: Building on Inclusive education, Admission policy for public ordinary schools, the Language Education Policy 1997 and the Norms and roles for the education Districts.

2.4.2 Reduction in Government Spending

For the year 2014/15, the minister of finance released the medium-term budget policy statement (MTBPS), which was marked by government spending reduction, through a further lowering of its existing expenditure ceiling by R25-billion. The proposal to lower government spending seeks to stabilise South Africa's rising government debt and reduce the budget deficit, currently estimated at 4.1% of the gross domestic product (GDP) (Donnelly 2014). The reduction in government spending will definitely affect all government entities including education. Donnelly (2014) reported that the Congress of South African Trade Unions (COSATU), have concerns with the reduction in Government spending as it will negatively affects the initiatives to stimulate the SA economy which is already lower than the level of population growth. They further argued that a real cut in spending, at a time when SA has a desperate need to stimulate economy, deliver services in underserved areas such as good quality education, and invest in employment creation, will exacerbate economic crisis.

2.4.3 Austerity Measures in the Department of Basic Education

Prior to the national call to reduce government spending, the Eastern Cape Department of Basic Education was experiencing internal financial challenges to the extent that, the Departmental circular No.8 of 2013 which reported that “The department intends to implement the Austerity Measures for the coming financial year (2013/14) in order to appropriately manage the budget to prevent over expenditure and at the same time to deal with the accruals” was released. This departmental circular was the source of Austerity Measures’ programme across the whole departmental spheres including the Districts. It meant that every Programme manager has to reprioritise his/her budget in order to accommodate this call. That meant that there will be areas that are not going to be reached because of this. Servicing of schools was not spared from this austerity programme. The signs became clear when the Department announced that it will no longer provide the subsidised car scheme to the officials but they were going to use the pool cars which were never enough. There was a huge demand for other tools of trade that were needed for the onsite curriculum support and monitoring of schools.

School visits that are conducted by the District officials are expected to be such that they yield sufficient information about the levels of implementation of the curriculum in the classroom to improve learner performance (Provincial Curriculum Guide (PCG), 2008). The PCG (2008) commands provision of information regarding the skills, subject knowledge, governance and management with regard to what is actually happening in classrooms and in the school in order for officials to provide adequate support to teachers where necessary. It is essential that school support visits begin to feature prominently in action plans, work plans and weekly itineraries of personnel and also intensive classroom visits so that teachers can be supported in a practical and realistic manner. For this active involvement by the education District officials in schools there, must be provision of the tools of trade.

The PCG (2008) shows that interventions to support schools to improve learner performance need group clinical visits by multi-disciplinary teams (Circuit Manager, Subject Advisory team and Education Support Services team). These teams will monitor among other things, attendance by learners and teachers, check the availability of learner support material, staff complement and appropriate deployment, availability of subject files, timetable and its implementation, Year Programme / School Improvement Plans, coverage of syllabi / pace setters, programme of assessment, evidence of management of staff and subject meetings,

discipline (learners and teachers), Staff development programmes and evidence of accountability session as well curriculum related strategies.

2.5. The research focus area

The view of on-site teacher support is shared by all countries and its effects have been felt. There is fear that the Austerity Measures will negate the outcomes of the action taken by the teams that visit the schools. The reviewed literature is more biased towards the Austerity Measures in the whole government sector rather than in a department or an institution like the Education District in Dutywa. Thus the effects of Austerity Measures have been researched all over the world based on a specific country, but their effect in the institution like the department of education Districts are still unknown. This is the gap that will be filled by this study. The researcher will therefore carry out a focused study in Dutywa Education District. The researcher will prepare questionnaires and conduct interviews with the Dutywa District officials. It is also imperative to know how the teachers are affected by these departmental Austerity Measures, hence the interviews will also be carried out with the school personnel.

2.5.1 The Profile for Dutywa District

Due to its geographic vastness, the Eastern Cape Department of Basic Education is divided into three Clusters, Cluster A, B and C. Dutywa belongs to Cluster B and it has been the worst performing District in the Cluster. It is one of the traditional rural Eastern Cape Districts. It has 349 public schools and sixty nine schools are more than 50 km from the District office. Sixty percent of the schools are in quintile one (the poorest of the poor schools) and not a single school is in quintiles four and five (the least poor schools). The District is characterised by poor performance in both Annual National Assessment (ANA) and the final Grade 12 results.

Based on the physical infrastructure, only one percent of the schools have flushing toilets. Only eighteen percent have municipal water connection others have boreholes, rain water tanks and seventeen percent have no on-site water. Seventy-nine percent of the schools have electricity. (Education Management and Information System (EMIS) 2014).

2.6 Conclusion

Having looked at how the implementation of Austerity Measures have affected other areas across the globe and reviewed other others studies, the author will look at how Dutywa Education District is going to fair as the programme progresses. Considering its rural nature and its history of underperformance, it is the interest of the researcher to study how this District is going to be affected by the Austerity Measures. In Chapter three the researcher will focus on the research methodology.

CHAPTER 3: RESEARCH METHODOLOGY

3.1 Introduction

Having gone through the literature review of how the cost cutting measures affect the delivery of quality education in various countries, this chapter presents the methods used in this study to investigate the effect of Austerity Measures to the officials and teachers in Idutywa, one of the Eastern Cape Education Districts, in curriculum delivery. For the researcher to answer the questions related to the effect of the Austerity Measures in on-site school support for curriculum delivery, qualitative research method was found befitting.

This qualitative study used structured interviews approach to gather relevant data. The interviews approach concerns itself with understanding and interpreting the meaning that participants give to a particular phenomenon (De Vos, 1998:18). The qualitative approach focuses on qualities of human behaviour. De Vos (1998) further asserts that the aim of this method is not to generalise but to understand and interpret the meanings and views that people attach to a particular issue based on their daily interactions and experiences. The qualitative research also provide the means through which a researcher can judge the effectiveness of a particular intervention, project or innovation (Paul et al. 2001:5).

Research Methodology is the process used to gather and analyse data needed to answer the research questions guiding a study (Dusick 2001: 1). A detailed methodology is critical to other researchers who may wish to replicate the study or expand upon it. Thus, the researcher aimed for clarity and accuracy when describing each step of the methods used when conducting the research. She explained why this method was chosen over others. The Methods Section is the section that clearly present each aspect of the process by which the study was completed. Every attempt has been made to leave no question as to the procedures used to complete the study (Anon 2008:1).

3.2 Research Design

A research design is a plan, logical structure of the inquiry and strategy of investigation that is considered in obtaining the answers to research questions or problems (Babikiri et al 2011: 4-5). They further explain that various research designs have been classified by being examined

from three different views which include (a) the number of contacts within the study populations; (b) the reference period, which refers to the duration in which a study is carried out to explore a phenomenon, situation, event or problem; and lastly (c) the nature of investigation. If in this research the situation before the implementation of the Austerity Measures was examined and later the evaluation of impact was carried out, then the design was going to be 'the pre-test and the post-test design'. The post and pre-test designs are evaluation studies that are most appropriate in the impact of the programme or intervention. This research design attempts to describe and explain conditions of the Austerity Measures at present in Idutywa Education District. It is called a Descriptive or Survey Research Design because it uses many subjects and interviews to fully investigate the phenomenon of Austerity Measures. This research design deals with data which is primarily written in response to the interview schedules and derives meaning from the participant's perspective and also aims to understand meaning that people attach to the departmental Austerity Measures (Bless & Higson-Son 1995)

The preparation of research design appropriate for this research problem involved consideration of the following:

1. Objectives of the research study outlined as -

- To find out how the imposition of the Austerity Measures affect the learner outcomes in the District.
- To investigate how the implementation of the departmental Austerity Measures affects the employees.
- To recommend strategies and methods to manage Austerity Measures

2. Method of Data Collection to be adopted – the researcher will interview sampled representative and make accurate estimates of the thoughts and behaviour of the larger population.

3. Source of information—Sample Design, that is the officials (21 out of 77 officials) who have 'on-site school support' as one of their activities.

4. Tools for Data collection will be the interview schedules because the interviewer had to interact with the respondents and clarify complicated issues while keeping the atmosphere as relaxed as possible. Interview schedules shall be developed and tested carefully before the actual interviews take place.

5. Data Analysis—since the researcher is expected to interpret the situation and give his/her impression the study is of the qualitative nature.

The qualitative approach is appropriate for this study because the focus is on the participants' subjective experiences on how these measures affect the process flow of the planned on-site school support programmes and the way they interpret them. This approach allows flexibility in all aspects of the research process. Marshall and Rossman (1995) further explain that the qualitative approach to research is uniquely suited to uncovering the unexpected views and to exploring new avenues. It is the approach that focuses on qualities of human interpretation of the situation. Since the Austerity Measures in the ECDBE aim at minimising the use of funds appropriated for each programme, even funds that are to be decentralised to Districts had to be reduced. This meant that the District officials had to reprioritise their programme to be in line with the reduced budget. This reduction of fund caused the researcher to pose the questions based on the effect of these measures to the employees as well as the learner performance which is the key objective of the Department of Education.

The function of a Research Design is to ensure that the evidence obtained enables the researcher to answer the research question as unambiguously as possible (Research Design: 16). It further refers to the structure of an enquiry as a logical matter rather than a logistical one. This study enables the researcher to establish how the Austerity Measures in the Eastern Cape Department of Basic Education affect the on-site school support by the Idutywa District officials. This Education District is among the worst performing districts in the Eastern Cape and one of the purposes of the on-site school support is to improve learner performance in all grades. The path to finding answers to the research questions constitutes research methodology. Therefore, the structured interviews will assist the researcher because the respondents will express their views and perspectives in terms of the Austerity Measures.

3.3 Research Questions

The purpose of the research is to investigate the impact of Austerity Measures in the Idutywa Education District and the following related research questions were explored:

- What are the effects of government spending Austerity Measures to the employees?
- What is the effect of government spending Austerity Measures to the on-site support of the curriculum delivery in the schools?
- How did the government Austerity Measures affect the learner outcomes?
- How could they be managed?

3.4 Population

The target population as defined by Burns & Grove (1997) is the entire collection of respondents with the selected set of conditions. In this study this simply refers to the Idutywa District and school officials who are involved with the curriculum delivery to the learners whether directly or through support services. This population is composed of the fifty-five (55) office based educators who hold positions of the Chief Education Specialist (CES), Deputy Chief Education Specialist (DCES) to the Senior Education Specialists (SES). The population will also include twenty-two (22) schools that performed below 60% in the final Matric examinations in 2014 because there are planned programmes that are focusing at these schools. The total population is therefore composed of seventy-seven (77) respondents which include both male and female officials that are office-and school-based irrespective of race and ethnicity. The number of years in a post will also strengthen the quality of responses because the respondent could relate to the period before the imposition of the Austerity Measures and the implementation period.

3.5 Sampling

Due to budget and time constraints, not all members in the population will take part in the study but a good representative shall be selected. The few members to be selected are called a sample. A sample therefore refers to a segment of the population selected to represent the population as a whole. Researchers draw conclusions about large groups by taking a sample. The sample will be representative and will allow the researcher to make accurate estimates of the thoughts and behaviour of the larger population (Anon 2008: 4). Designing the sample calls for three decisions:

- a) The sample – which answers the question ‘Who will be surveyed? The researcher determines what type of information is needed and who is most likely to have it. The following are the sampled officials:
 - i) CES – Curriculums, ESS and IDS&G
 - ii) Subject advisors
 - iii) Circuit Managers
 - iv) Grade 12 educators
- b) The sample size responds to the question ‘How many people were surveyed?’ The researcher also determines how large or small is the sample that is going to be

interviewed without compromising the reliability of the results. It is not necessary to sample the entire target population. In this study there were 3 CESs, 10 Subject Advisors, 3 Circuit Managers and 5 grade 12 educators. The sample size is 21 respondents. Lastly,

- c) Sampling determines how the sample should be chosen. The researcher may decide to choose sample members at random from the entire population. This sampling method is called probability sampling. If the researcher decides to select people who are easier to obtain information from, she would have undertaken the nonprobability sampling.

When deciding on the sample, the needs of the research project determines which method is the most effective. The researcher in this study will employ simple random sampling method because 77 members of the population have a known and equal chance of being selected.

3.6 Informed Consent and Confidentiality

1. Participants shall be informed that they are being asked to participate in a research study;
2. Participants will be provided with an explanation of the purposes of the research and the expected duration of their participation;
3. Participants will be given a description of the procedures to be followed;
4. There were no foreseeable risks or discomforts that are going to be experienced by the participants;
5. Participants shall be given a description of any benefits to themselves or others that may reasonably be expected from the results of the study;
6. Participants will be given a statement describing the extent of confidentiality;
7. Participants will be told to contact the District Director for answers to pertinent questions about the research and research participants' rights and;
8. Participants shall be given a statement that participation is voluntary, refusal to participate involves no penalty or loss of benefits to which the respondent is otherwise entitled, and the respondent may discontinue participation at any time without penalty (Dusick 2014).

3.7 Data Collection

The researcher will use face-to-face interview method and the sessions will be tape recorded. The respondents will be taken from one section of the questionnaire to another based on their responses. With face-to-face interviews, the questioning process includes the clarity on complex questions. The interviewer-administered questionnaires contains few closed ended questions for general information and open ended questions for the respondents' personal views. A tape recorder will be used to capture accurate aspect of the respondents' views and to adhere to the issue of trustworthiness in data collection. The interview method is very flexible and can be used to collect large amounts of information. The questions are prepared in such a way that they will capture the respondent's attention. The researcher will be available to clarify difficult questions. Face-to-face interviews can be used in any type of questionnaire and be conducted fairly quickly (Anon 2008).

The researcher shall avoid the self-administered questionnaires because Kaden (2006) asserts that the estimated 50% of respondents who start self-administered questionnaires do not complete them. Even though there are no hard-and-fast rules for the flow or sequence of questions, the researcher shall ensure that the respondents are kept in one mind-set at a time by completing one topic before moving to the next. The easy questions will be asked first such as the 'position held by the respondents and the number of schools visited per month', so that the respondents could get comfortable with the interviews. More involved or introspection questions will be placed near the middle of the schedule. Complex questions that need more thought shall be at the end. There will be no sensitive issues asked in the schedule.

Table 1: Summary of data collection

Objectives	Research Questions	Questions (District Officials)	Questions (Educators)
1. To find out how the imposition of the Austerity Measures affect the learner outcomes in the District.	How do government Austerity Measures affect the learner outcomes?	B: 2	B: 3, 4

Objectives	Research Questions	Questions (District Officials)	Questions (Educators)
2. To investigate how the implementation of Austerity Measures affects the employees.	What is the effect of government spending Austerity Measures on the employees?	A: 3, 4, 6 B: 1, 2, 3, 5	B: 1, 2
3. To establish how the Austerity Measures affect the on-site support of the curriculum delivery in the schools.	What is the effect of government spending Austerity Measures to the on-site support of the curriculum delivery in the schools?	A: 5 B: 6	B: 5
4. To recommend strategies and methods to manage Austerity Measures.	How can the Austerity Measures be managed?	B: 4,7	6

Table 1 summarises the responses to objectives in column 1.

The objective ‘To find out how the imposition of the Austerity Measures affects the learner outcomes in the District.’ is expressed in the Research Questions’ column. To address the Research Question, the responses were from the question B2, B3 and B4 of the interview schedule.

3.8 Pilot study

Gould (2011) asserts that pre-testing is important to help the researcher identify any problems with the format or wording of questionnaires before the actual interviews take place. At this stage one can iron out any ambiguities, vagueness or inaccuracies, or add or delete questions. For pilot study, interview schedules were administered to three officials, namely director from Quality Promotions and Standards (QP&S), Senior Education Specialist from QP&S and the Chief Education Specialist from District Coordination and Support. Their comments were factored in the interview schedules.

3.9 Reliability, Validity and Trustworthiness

Reliability and validity issues are the main factors that can weaken the power of the research study. Trustworthiness is established by both validity and reliability (Lincoln and Guba cited by Shenton (2007). Polit and Hungler (1993:445) refer to reliability as the degree of consistency with which an instrument measures the attribute it is designed to measure. It may further refer to the quality of a measurement procedure that provides repeatability and truthfulness.

The two interview schedules to be answered by both District officials and educators need to reveal consistency in responses. Reliability will also be ensured by minimising sources of measurement error like data collector bias. Bias on the part of the researcher is unethical. Bias is a deliberate attempt to either hide what you have found in your study, or highlight something disproportionately to its true existence. Data collector's bias will be minimised by the researcher's ethical obligations, by being the only one conducting the interviews, and standardising conditions such as exhibiting similar personal attributes to all respondents, e.g., friendliness and support. The elements of reliability and validity will prevail. The physical and psychological environment where data shall be collected will be made comfortable by ensuring privacy, confidentiality and general physical comfort. The respondents will be offered comfortable chairs in the office, windows will be opened for fresh air and a 'do not disturb' notice will be placed on the door to maintain privacy and prevent interruptions. Names will not be written on the questionnaires to ensure confidentiality.

The validity of an instrument is the degree to which an instrument measures what it is intended to measure (Polit & Hungler 1993:448). Content validity refers to the extent to which an instrument represents the factors under study. To achieve content validity, questionnaires includes a variety of questions on the effect of the government Austerity Measures on an individual official and on his/her activities. The question on the performance of the learner at the end of the academic year also strengthens the validity content.

Lincoln and Guba (2007) argues that ensuring validity and credibility are one of the most important factors in establishing trustworthiness. Eliot (2011) specified that there are five measures that increase the trustworthiness of the qualitative data namely:

- Outline clear participant criteria;

- Develop a set of thoughtful, targeted, unbiased questions;
- Collect data in multiples;
- Use systematic process for analysing qualitative data and lastly;
- Conduct member's checks.

In this study the criteria for sampling will be clearly defined and most of the participants are officials that are responsible for the on-site school curriculum support and the practising educators. The questions that were developed were not biased but were set in such a way that they respond to the objectives of the research and will in no way lead the respondent to a specific direction. The data will be collected in the form of structured interviews and all the themes that could be a response to the research questions will be considered. Educators will be interviewed in a classroom, questions will be rephrased and clarified so that everyone can understand and respond according to his/her own perspective. Therefore, all themes will be covered.

3.10 Data Analysis

To analyse data, a systematic and reproducible data analysis process shall be used and anyone using the same process may be able to closely replicate the results of this study. To conduct a 'member check', the research findings will be shared with some of the respondents and the findings shall be validated in the Idutywa Districts.

3.11 Ethical Considerations

The conducting of research requires not only expertise and diligence, but also honesty and integrity. This is done to recognise and protect the rights of human subjects. To render the study ethical, the rights to self-determination, anonymity, confidentiality and informed consent will be observed. To observe the ethics, the researcher applied for the Ethical Clearance Certificate from the University of Fort Hare's Research Ethics Committee (UREC). (See Appendix 1). The UREC granted the clearance certificate with the reference number: MLE051SLOM01 stipulating amongst other things that the UREC must be informed immediately if:

- Any material change in the conditions or undertakings mentioned in the research proposal document and

- Any material breaches of ethical undertakings or events that impact upon the ethical conduct of the research

Written permission to conduct the research study has been obtained from the Head of Department (HOD) of the Department of Basic Education –Eastern Cape, the District Director of the Idutywa Education District as well as the Principals of the sampled schools. Respondent's consent will be obtained before the interviews are conducted. Burns and Grove (1993:776) define informed consent as the prospective subject's agreement to participate voluntarily in a study, which is reached after assimilation of essential information about the study. The subjects will be informed of their right to voluntarily consent or decline to participate, and to withdraw participation at any time without penalty. Subjects will also be informed about the purpose of the study, the procedures that are going to be used to collect the data, and assured that there will be no potential risks or costs involved.

Anonymity and confidentiality will be maintained throughout the study. Burns and Grove (1993:762) define anonymity as when subjects cannot be linked, even by the researcher, with his or her individual responses. Each respondent will be called to sort out appointment for interviews and the interview schedule was sent in advance for him/her to familiarise him/herself with the questions.

3.12 Conclusion

This chapter described the research methodology, including the population, sample, data collection instruments as well as strategies used to ensure the ethical standards, reliability and validity of the study. Since the purpose of this study is to investigate the effect of the Austerity Measures in on-site school support, the researcher will explain in detail methodology to be applied in this research, population and the sampling of the departmental officials will be outlined.

Permission to carry out this research was sought from the Eastern Cape Department of Basic Education's Head of Department, the District Director of the Idutywa Education District as well as the principals of schools that performed below 60% during the final exams in 2014. The ethical and confidentiality issues cannot be overemphasised and the data presentation, analysis and interpretation are carried out in the following chapter.

CHAPTER 4: DATA PRESENTATION AND ANALYSIS OF FINDINGS

4.1 Introduction

The impact of global financial challenges and the labour unrests are phenomena that the South African government institutions are now forced to deal with if they are to curb over-expenditure on compensation of employees. One of the ways of dealing with these challenges is to impose government Austerity Measures (AM), as it is the case with the DBE in the Eastern Cape. This study focuses on the effect of government Austerity Measures in on-site school support for curriculum delivery in Idutywa Education District.

The previous chapter outlined the methodology employed in this research to collect data. The data collection instrument was discussed and the indication was given of the method of analysis to be used. This chapter will present, interpret and analyse data collected from the Idutywa District on the effect of Austerity Measures to the officials who are responsible for on-site school support and the educators. Thematic analysis will be used in this qualitative research to emphasize on studying themes within the data. Boyatzis (1998) stated that thematic analysis is the most common form of analysis in qualitative research which emphasizes pinpointing, examining and recording patterns or themes within data. It is one of a cluster of procedures that focus on categorising patterned meaning across a set of data.

The raw data collected from the District officials and educators will be placed into logical, meaningful categories and be presented in text, tables and graphs. Analysis of findings will be discussed, linked to the literature reviewed and conclusions will be drawn.

This qualitative study specifically sought to answer the research questions that are reflected below:

- What is the effect of government spending Austerity Measures to the employees?
- What is the effect of government spending Austerity Measures on on-site support of the curriculum delivery in the schools?
- How do government Austerity Measures affect the learner outcomes?
- How can they be managed?

To conduct a ‘member check’ as per Blum (2006:7), the research findings were shared with the District Director as well as the Supply Chain Manager of the District. The findings were acknowledged and validated.

4.2 Demographic Analysis

Demographics refers to the relevant related information on the population of the study (Thematic Analysis 2006:2). The inception part of the research schedule was about the confirmation of the general information of every respondent and was recorded as follows:

Table 2: General Information for the District Officials respondents

DO	Section	Position	No. of years in the position	Gender M/F	No. of schools planned to be visited per month	Actual number of schools visited per month	Variance Col6-Col5
1	CURR	CES	3	M	60	30	30
2	ESSS	CES	10	M	40	35	5
3	IDS&G	CES	6	M	20	10	10
4	IDS&G	EDO	10	F	15	10	5
5	CURR	DCES	3	F	18	10	8
6	CURR	DCES	8	M	35	7	5
7	CURR	DCES	6	M	10	5	5
8	CURR	DCES	12	F	20	4	16
9	CURR	SES	12	F	24	10	14
10	CURR	SES	12	F	33	15	18
11	IDS&G	EDO	7	M	25	10	15
12	CURR	DCES	8	F	25	13	12
13	IDS&G	EDO	3	F	20	5	15
14	IDS&G	SES	12	M	150	0	150
15	IDS&G	EDO	7	F	10	8	2
16	ESSS	SES	10	M	24	24	0

In Table 2 the reasons for variance between ‘Number of schools planned to be visited per month’ and ‘Actual number of schools visited per month’ range from the lack of transport to clashes of Districts or Provincial meetings with the officials’ planned school visits. Thirteen out of sixteen District Offices respondents said that the reason for variance is ‘the unavailability of transport’ and only three cited other reasons.

Table 3: General Information for Educators

# Educ.	Position held	Subject taught	Grade	2013 Average Performance %
17	HOD	Tourism	12	60
18	Educator	Accounting	12	53
19	Educator	Maths Literacy	12	50
20	Educator	Accounting	12	45
21	Principal	Life Sciences	12	39

4.3 Thematic Analysis of Qualitative data

The researcher’s aim is about thematically analysing the qualitative data in a systematic manner that results in credible answers to the research question and objectives embedded within this study. Qualitative data means data that is generated through in-depth interviews, focus groups, field observation, semi structured elicitation tasks or visual data collection techniques (Analytic Thematic Analysis 2013:4).

4.3.1 Identification of themes

Theme 1: The rationale behind the Austerity Measures

Theme 2: Interrupted plans of on-sites school support activities

Theme 3: The scarce resources

Theme 4: The morale of the employees

Theme 5: Negligence in funding for GET Phase

Theme 6: Challenges faced by teachers due to lack of onsite support

Theme 7: The learner outcomes

Theme 8: Teacher shortage

Theme 9: Austerity Measures are counter productive

Theme 10: Alternatives to Austerity Measures

Table 4: Classification of the identified themes based on the research objectives and research questions.

#	Research Objectives	Research Questions	Identified Theme/s
1	To investigate how the implementation of Austerity Measures affects the District employees.	What is the effect of government spending Austerity Measures to the employees?	<p>Theme 1: The rationale behind the Austerity Measures</p> <p>Theme 2: Interrupted plans of on-sites school support activities</p> <p>Theme 3: The scarce resources</p> <p>Theme 4: The morale of the employees</p>
2	To establish how the Austerity Measures affect the on-site support of the curriculum delivery in the schools.	What is the effect of government spending Austerity Measures on the on-site support of the curriculum delivery in the schools?	<p>Theme 5: Negligence in funding for GET Phase</p>
3	To find out how the imposition of the Austerity Measures affect the learner outcomes in the District.	How do government Austerity Measures affect the learner outcomes?	<p>Theme 5: Negligence in funding for Primary Phase</p> <p>Theme 6: Challenges faced by teachers due to lack of onsite support</p> <p>Theme 7:</p>

#	Research Objectives	Research Questions	Identified Theme/s
			The learner outcomes Theme 8: Teacher shortage
4	To recommend strategies and methods to manage Austerity Measures.	How can they be managed?	Theme 9: Austerity Measures are counter productive Theme10: Alternatives to Austerity Measures

For the identification of themes in Table 4 the researcher identified recurring phrases or words from the respondents for the same question posed to each of them based on the research objectives. Ten themes were identified. The first five themes address the way the Austerity Measures are understood by the employees and how they affect them. Themes five to eight address the effect of Austerity Measures on Learner Performance flowing from the previous theme of the “*Negligence in funding for Primary Phase*”. The last two are about the management of the Austerity Measures going into the future.

4.3.2 Theme1: The rationale behind the Austerity Measures.

The cost containment National Treasury instruction 1 (2013) with effect from 01 January 2014 completely changed the faces of ever struggling and under resourced education Districts. At this time the Provincial Office had already stopped the procurement of office furniture and the procurement of stationery was already centralised at Head Office. This instruction outlined a bureaucratic procurement process which takes weeks or even months before the approval to carry out an activity is given. The officials who are affected by this instruction are not conversant with the real reason why the Austerity Measures are imposed on Districts. Some believed that it is the Head Office doing.

This reason was reiterated by the District Office respondent number 9, (DO-9) when commenting that:

“The Department is trying to mitigate the problem of irregular expenditure”

The DO-1 stated that:

“Departmental fiscal expenditures is getting depleted. There are more expenses than revenue, audit outcomes are unclean and the aim is to close leakages in SCM.”

This statement is partly true but the greater part of it has nothing to do with the imposition of the Austerity Measures. Generally, the officials have tried to reason with the idea for the imposition of the Austerity Measures in the Provincial Office but none of them knew the real rationale based on the National Treasury’s instruction about the Cost Containing Measures. The Chief Financial Officer for Education is responding to this instruction. This may mean that there was not proper communication of this instruction to the technocrats of the Department.

Some respondents do not even see the necessity for the austerity measure and see them as political interference. This became evident by the response of DO-11:

“...It is political pressure that is exerted by unions...” and DO-14 blamed the past regime for the department to be under pressure. *“The DoE is not well resourced due to the past apartheid regime”*.

For the programme or project to be successfully received and well understood by all, there must be clear communication at all levels of the organisation. If it is a project, it must clearly state the start and the end periods. If it is a programme, there must be clear objectives and performance indicators that will be benchmarks achieved for the programme. Out of sixteen respondents, only three really know why the Austerity Measures are imposed. At this point no one knows how long they are going to be implemented. This leads to various reactions from the departmental employees as these will be gathered in the forthcoming responses.

4.3.3 Theme 2: Interrupted plans of on-sites school support activities

Planning is a process of thinking about and organising activities required to achieve a desired goal (Planning 2015:1). When plans are interrupted, the required goals will not be achieved at the prescribed time. In this study the goals of on-site support is to improve learner performance in the Districts and thence the Province. Fifteen out of sixteen responses were affirmative to the following question:

“Do the Austerity Measures affect your on-site school support activities?”

The respondent DO-14 affirms by saying:

“Yes, there is a plan but I could not move because funds are depleted”

The respondent DO-10 further alluded to the fact that they: *“...cannot go and do workshops because their activities were not approved.”*

DO-12 indicated that: *Yes. Sometimes even the date planned for the workshop got postponed or cancelled.”*

DO-8 Stated that: *“We have to write letters to request to procure for the activity. In the process, the time lapses for the activity to take place.”*

DO-15 says that: *“Sometimes when I need to visit schools, I cannot just go to schools as I have planned. Subsidised schemes have come to an end and funds for ‘Own Transport’ item got finished before the end of the financial year.”*

The response to the above quoted question clearly shows that the purpose of planning was not achieved as some of the planned activities have to be cancelled and others are postponed. This means the services that were going to be rendered in order to benefit learners did not take place. Hence Bradshaw and Main (2014:17) argued that, ‘The burden of austerity has fallen particularly heavily on children’.

The District officials have resorted to running workshops for these schools due to unavailability of transport. They still do not win because the function to authorise funds is with the Head Office (centralised). The bureaucratic process still has to take place. This will lead to the third theme which is about the scarcity of resources.

4.3.4 Theme 3: The scarce resources

The researcher has stated that the Idutywa District is greatly rural and is 138 km away from the Head Office. The ‘transport complaints’ by the District Officials has a far reaching impact. The subsidised scheme has been discontinued since 2013 and the GG cars have a limit of 2 300km per month per vehicle (Austerity Measures) irrespective of the distances from the Head Office to schools. Table 5 depicts the distances of Cluster B Education Districts offices from the Head Office, the closest being Butterworth (105 km) and the furthest is Sterkspruit (328 km).

Table 5: Cluster B Districts' distances from the Head Office (EMIS 2013)

Districts	Distance (km)
1. Butterworth	105
2. Cofimvaba	121
4. Dutywa	138
17. Mthatha	219
18. Ngcobo	175
20. Queenstown	146
22. Sterkspruit	328
10. Lady Frere	161

The furthest school from Idutywa District Office is 149km. With the limited number of GG vehicles that are available in this District, the officials that are supposed to do on-site school support found themselves wanting. The Supply Chain Management on the other hand, as the custodian of assets amongst other things, guards this transport item to the point that it became detrimental to the Professional Services. Hence, the above mentioned respondents comments on the unavailability of transport which hinders the on-site school support activities.

Table 6: The average distance from schools to the District Office (DO) (EMIS 2013)

Distance from the DO	Number of Schools	% of Schools
Less than 5km	11	3
Between 6 and 10km	18	5
Between 11 and 25km	100	29
Between 26 and 50km	142	42
Greater than 50km	69	20
Total schools	340	100

Figure 1: Distances from School to the Idutywa District Office

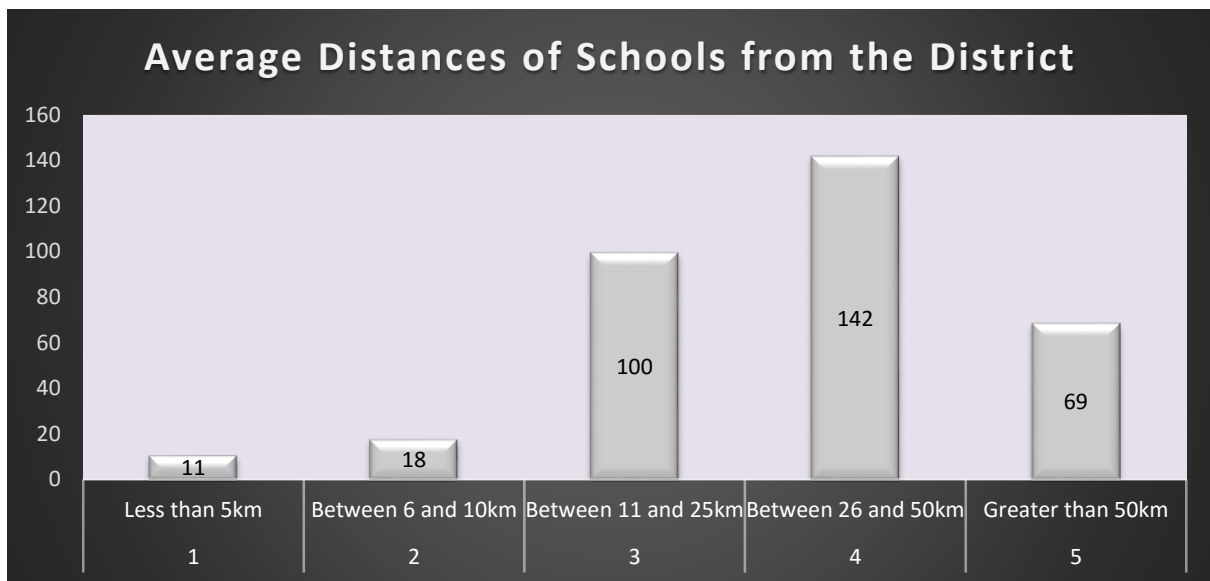


Figure 1 depicts that only 29 schools in Idutywa District are within a 10 km radius from the District offices. 243 schools are in radius of 11km and 50km and 69 schools are more than 50 km away from the District office. This is the kind of information that must be taken into consideration when the allocation of resources such as transport is supplied to the Districts. Now, the Head Office has used the blanket approach in resource allocation which disadvantages rural Districts such as Idutywa. Furthermore only about 1% of these schools are in tarred roads.

The respondents DO-6 has mentioned that:

“It seems as if the Head Office has forgotten the core activities. No transport to go schools.”

Appelbaum (2013) argues that government cutbacks may cause short-term pain but tends to provide long-term benefits. However, his statement will only ‘hold water’ if there were resources and the plans based on them. In Idutywa the situation is such that out of 15 Subject Advisors only one has a subsidised vehicle. They all have to scramble for the GG cars that are very few. The DO-3 respondent assert that:

“Due to lack of vehicles, visits are not determined by the need but by the availability of finances. The allocated funds are enough for a 1/4 of a year.”

Respondent DO-9 stated that:

“It is hard even to get the printing paper. If we want to print we must use our own money at the internet café.”

The respondent DO-10 complains that:

“We cannot implement the plans we have for schools, cannot buy coloured pens for moderation and have no laptops to develop material for teachers. We must pay the internet café out of our pockets to make the programmes work.”

The National School Nutrition Programme (NSNP) officials are the only ones that are not affected by transport shortage because NSNP is a grant and as a result no Austerity Measures can temper with these funds. The only thing that affects them is that they have to loan their cars to the Curriculum Section during examinations. Other than that they are the only officials that are better off. They are of course not immune to the lack of printing material, laptops, photocopying machines and paper. This is confirmed by the DO-2 who is the Chief Education Specialist:

“Yes, no working tools, no fax line, no email and photocopying machines for use by the officials.”

The Department of Basic Education has proposed the minimum requirement of resources that are needed by the District officials. Out of the proposed list in table 4.6, there are some Idutywa officials who do not have the tools of trade. There is only one working photocopying machine and printer used by the whole District (55 Professional staff and the rest of the corporate services as well as the administrative staff).

Table 7: (DBE, 2013) Proposed Minimum Resource Package / Basic tools of trade for the District

Resource category	Resource	Rule
Office ICT	Desktop	1 per admin
	Internet access	1 per office based employee
	Internet access	1 per management official
	Telephone line	1 per office based employee
	Fax machine, printers, photocopiers (heavy duty), scanners	2 per district
Mobile ICT	Laptop	1 per school visiting official

Resource category	Resource	Rule
	Cell phone	1 per school visiting official
	3Gcard	1 per school visiting official
Vehicle and parking area	Access to parking space	1 per every 3 school visiting officials
	Cars	1 per every 3 school visiting officials
Office Equipment	Desk / Tables	1 per district official
	Chairs	1 per district official
	Cabinets / Cupboards	1 per district official

Table 8: The status of Tools of trade in Dutywa District (District Report 2015)

Items	Number Required	Number Available	Shortage
Laptops	79	46 (20 received in November 2015)	33
Desktops	39	10	29
Pool Vehicles	14	09	05
Subsidised Cars	50	05	45
Printers	9	01	8
Photocopiers	12	04	08

Figure 2: Graphical representation of the need of tools of trade in Idutywa

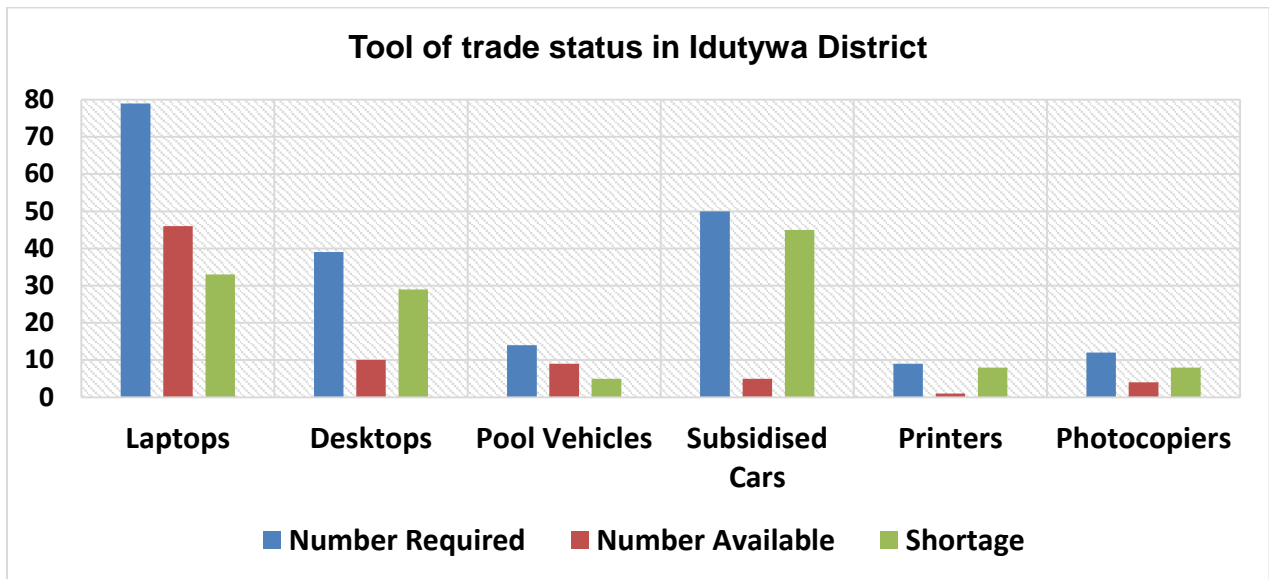


Figure 2 depicts that there is a dire need for subsidised vehicles (45 cars) and there is improvement in the provision of laptops (20 received in November). The scarcity of resources is a huge challenge in Idutywa District. This give rise to the low morale of the employees expressed in the following theme.

4.3.5 Theme 4: The morale of the employees

The response to the Research Objective: “To investigate how the implementation of Austerity Measures affects the District employees.”, and the Research Question: “What is the effect of government spending Austerity Measures on the employees?” the respondents poured out the discontent they experience when they are to go to schools for on-site support activities.

The first respondent (DO-1) mentioned that:

“Seeking approval for every expenditure is time consuming. Cannot provide the officials with the material we want to give them because we could not reproduce it.”

The second respondent (DO-2) stated that:

“I have to fix the broken windows out of my pocket; I use my own laptop; I use my own 3G card for emailing; I cannot communicate with schools, cannot produce circulars, there is no stationery, need to get authorisation for procurement. This is killing us.”

The third respondents was more concern about her wellbeing. She said:

“This dent my dignity, I have to beg schools for resources (such as printing and photocopying) and have no laptops to prepare teacher resources.”

Respondent 10 (DO-10) feels that she is not giving the work her all capabilities because of the resource constraints.

“I cannot stretch myself to the level that I am capable of because of lack of resources.”

In a case like this, the question is how much the learner is losing out due to this position of the departmental employees. The response for DO-12 shocked me. She said that:

“It affects me psychologically, one becomes stressed when programmes are not done as planned.... if you have planned the programme you experience sleepless nights because you are not sure whether your programme will happen or not. Will the programme be approved or not.”

The respondent DO-14 indicated that he does not visit schools anymore and he is responsible to resource them. He therefore needs to ensure that the resources are utilised for what they are intended for and also if they are not just kept in the principal’s office. This is what he has got to say:

“You have got a plan but you could not implement it, this demoralises you. There is no evidence that all is well in schools because we cannot go and monitor.”

It is difficult to accept the fact that the implementation of the Austerity Measures can drive the departmental employees to incapacity.

The other group of officials who have low morale are the primary schools Subject Advisors and the Circuit Managers. The first and the last time they see a budget allocated to them is when it was still on paper. When they want to spend it they are told about the Austerity Measures and that the funds have to be used to fund the secondary schools intervention programmes. This became evident when ANA was written and there were no teachers to mark scripts for subjects that had no teachers (District report 2015:2). The next theme on ‘Negligent to funding the Primary Phase’ will throw light to this issue.

4.3.6 Theme 5: Negligence in funding for GET Phase

Among the District respondents there were Subject Advisors who are responsible for the Primary Phase (Grade R to Grade 7). These officials felt that they are badly hit by the Austerity Measures. This became apparent in their responses, DO-8 and DO-9 respectively:

“We have no clue of the amount of funds allocated to Primary Phase. Our plans are based on paper budget.” and

“We cannot tell how our funds have been utilised. We only saw the paper budget but never got to spend the funds.”

These officials are despondent because one needs to have funds in order to go out and support schools. Sometimes they do not even begin to implement their plans. Strengthening primary education may lead to better performance in matric which is how the school, District and also the Province is measured.

4.3.7 Theme 6: Challenges faced by teachers due to lack of onsite support

The importance of on-site school monitoring and support as means of helping the learners to maximise the gains from their learning experience is outlined in the General Education Modules (2000: 48) of the Southern African Development Community (SADC). It further explains that on-site support assists teachers to sharpen their teaching skills, improve their delivery methodologies, develop their leadership skills and qualities, and ensure goal achievement. All of the above accolades are lost if the district officials do not support educators. This was voiced out by one of the educators as she says:

“Learners are not 'moving', we do not get some information, we need resources and laboratory.” Said Educ-19 when responding to the question based on the challenges she experiences due to the lack of, or minimal support they receive from the District.

“We do not have equipment for subjects like Physical Education, more exercises for Life Orientation, videos for aerobic, need gymnastics equipment. Subject Advisors do not know how learners are performing in class. We need class visits.”

These were the sentiments of the Life orientation educator (Educ-20).

“There is poor communication, we do get to know things like Moderation ideas.”

This was the frustration mentioned by the respondent (Educ-17). The challenges faced by educators have a direct effect to the performance of learners. If the educator has a content gap and there is no one to assist, the learners who were taught by that educator will also have a gap on that section. The following theme on the Learners outcome will focus of the Learners performance.

4.3.8 Theme 7: The learner outcomes

National Planning Commission (2011:20) commented that: “Teaching in schools can be improved through targeted support by District offices. District offices should also ensure communication and information sharing between the education authorities and schools and also between schools.” Learner performance in the schools visited is below 60% and teachers cited various challenges they are experiencing due to lack of support by the District officials. Respondent (EDuc-17) cited that:

“There is poor communication, we do not get to know things like Moderation processes.”

The respondent (Educ-18) asserts that:

“We need more time with the advisors. We must be provided with material, assisted in content gap, the advisors must organise workshops.”

Due to the vastness of the District and of course lack of transport, the District officials whenever possible, cluster schools and give a blanket instruction and advice to all teachers. Hence, the comment of the respondent Educ-18 that the schools are unique and they need more time with the Subject Advisors.

Since learner performance is the first strategic goal for The Department of Basic Education, there is a Learner Attainment Intervention Strategy (LAIS) programme. All schools’ activities revolve around LAIS. There are funds that are put aside for this programme. Due to Austerity Measures, these funds have been tremendously reduced. Districts will be asked to submit plans that with costs to the Head Office and only to find that the available funds will not fund even half of what was planned. The plans that were earmarked to improve the quality of learner performance go to waste and the learner results keep on plummeting.

The other challenge that is faced by teachers is lack of educational resources such as library, science and computer laboratories, and gym facilities to mention a few. This sentiment was echoed by the Educ-20 by saying that:

“Provision of text books for learners, computers for learners’ research and skills to use computers.”

Respondent Educ-21’s view is that *“... if the District officials come frequently with new skills and approach to teaching, learner performance may improve, resources such as projectors and financial resources are necessary.”*

There are strategic objectives that must be achieved by the Province. These will only be realised if the Districts are doing their part. For example, the strategic objective 2.4 namely: To increase the number of grade 12 learners who pass Maths and Science (Provincial Operational Plan 2015) could only be realised if the following activities are carried out:

- Conduct content gap workshop
- Conduct planning sessions with teachers beginning of each term.
- Conduct study camps for bright sparks
- Develop, distribute and ensure administering of common tasks
- Visit schools to monitor and support curriculum coverage, school-based assessment etc.
- Participate in expos, indabas, conferences and other co-curricular activities.

The average results of the subjects offered by the interviewed educator is below 60%. Even though they have scored good marks in subjects like Life Orientation, the rest of the marks are below the Provincial target. These teachers are in dire need of all the activities mentioned above in order to achieve the Provincial target of 70% matric pass rate. Teacher shortages is another hindrance in improving learner performance. The next theme will deliberate on this issue.

4.3.9 Theme 8: Teacher shortage

On the 30 September of every year the Member of the Executive Committee (MEC) of Education – declares the number of teachers’ posts that will be in the Province namely the ‘post basket’ in the next financial year. In 2014/15 he indicated that the number of posts declared will be the same as in the past financial year due to financial constraints. Again in September

2015 he stated that the number of teachers' posts in 2016 will also remain similar to the past year. This is in response to the Minister of Finance's Budget Speech (2015/16) wherein he iterated that South Africans must do more with less during this time of economic downturn.

When these post baskets are declared by the MEC, the Circuit Managers have to go to their respective schools and break the news irrespective of the dire situation of the need of teachers in their schools. They must 'do more with less' and 'turn stones into bread' so that learner performance is improved. Respondent DO-4 stated that:

"The Austerity Measures affect learner performance. There are subjects that do not have teachers and there is nothing the Circuit Managers can do."

In his Budget Speech (2015/16), the Minister further indicated that the emphasis will be on quality of schooling outcomes, and on better preparation of young people for the life and work opportunities after they leave school.

Shortages of teachers is a reality in the schools mainly because the Eastern Cape is characterised by having small and unviable schools. In these schools there must be a teacher for each subject and for every learner. The schools are expecting the Circuit Managers to provide the teachers. Respondent DO-15 said:

"Allocation of teachers must be based on the need of the school because even if the learner numbers have gone down, the subjects are still there."

Respondent DO-4 clearly stated that:

"There are subjects that do not have teachers and there is nothing the Circuit Managers can do. Shortages of teachers while focusing on improving the quality of schooling, the quality of learning, and the quality of teaching in our Sector is a dichotomy."

Since the Circuit Managers are responsible for schools it stands to reason that they must have powers to provide teachers in the deserving schools, that is, in the schools where there are substantive posts.

4.3.10 Theme 9: Austerity Measures are Counter-productive

The vision of the Department of Basic Education is to provide learners with opportunities to become productive and responsible citizens through quality basic education (Annual Performance Plan 2015). During data collection, the researcher explained the rationale behind the Austerity Measures (AM) to the respondents so that they respond in an informed manner. When the respondents were answering the question: “Do you think the Austerity Measures produce the desired results?” none of them replied in the affirmative. Even though most of the respondents understood that the Department is in a bad financial position, none of them believe that the implementation of the Austerity Measures is in line with the mission and the vision of the Department of Basic Education. They are saying this because the implementation of the Austerity Measures has affected learners in a negative way hence the poor matric performance in the Idutywa District.

The respondent DO-2 made his views in no uncertain terms that:

“We can save money but we fail on the delivery mandates. No appointments. We are renting apartments. We are not winning. We do not appoint teachers and office staff.”

Respondent DO3 says this:

“In terms of saving yes, but they impede operations in terms of the plans. Things are not done according to the plans.”

The other respondent said: *“No, for the purpose of education but in terms of financial management and controls, there will be the desired results. But educationally they are detrimental.”*

The other respondent (DO-8) goes to the point of suggesting what should precedes the imposition of the Austerity Measures in an institution:

“Before the AM, the government was supposed to furnish the Districts with the required resources then apply them”

Many respondents agreed that imposition of austerity measure will result in the savings by the Department of Education but the core business – which is teaching and learning will suffer. These includes the following respondents:

“Yes, they do assist in controlling expenditure but the downside is that it is frustrating to the implementing officials who have to wait for the approval-submission route which is too long.”

The other one commented that: *“The Department is going to save but work is not going to be done. The child is suffering in the process.”*

4.3.11 Theme 10: Alternatives to Austerity Measures

Having worked through the Austerity Measures that are imposed by the Provincial Office on the District employees, the researcher wanted to know what policies will the respondents put in place to curb the overheating expenditure on the ‘Compensation of Employees’ if they were Policy Makers. Various views were put forward by various respondents and they vary according to the position they hold in the departments. Educators’ views were more of classroom focus and the District officials’ views were more strategic.

The respondent Educ-17 purported that, if he was a policy maker, he will ensure that there are Subject Advisors instead of imposing the AM and he will:

“Instruct Subject Advisors to visit schools, since there are many schools, they must cluster them.”

The respondent 18 (Educ-18) viewed the over expenditure as a result of corruption and lack of monitoring. He said that:

“He will root out corruption, monitor tenders, and resources. All department offices must have resources and they must be monitored.”

This respondent views Department of Basic Education as an institution that is lax as far as monitoring is concerned and also that the Department is corrupt. The respondents’ policies will talk to routing out corruption.

Respondent 19 (Educ-19) will cut out on activities that are deemed unnecessary for quality teaching and learning. She believes that if every learner has a textbook, their performance will improve a great deal. She contended that:

“Every child will have a text book...”

“Minimise the less important things such as workshops that cost a lot of money.

Workshops to be conducted on-site.”

The respondent Edu-29 sees education as wasting money by conducting workshops, he will therefore reduce them.

The last educators' respondent purported that:

"I will ensure that there are enough teachers in schools and will change the model of teacher provisioning but will look at the curriculum needs of the school."

The above respondents are the ones who really feel the negative effect of the AM because they are the end-users in the production chain. Section 58(b) (SASA 1996:65) gives the Head of Department the right for consequence management if the learner performance is below the standard prescribed in the National Curriculum Statement in a particular school. The schools have to ensure good performance despite the imposition of the AM by the Provincial Office.

The first District respondent (DO-1) stated that the policy alternative that he will provide will be to: *"...ensure that every District has a resident internal auditor to monitor expenditure both in the District and schools. Will ensure regular monitoring."*

The second (Do-2) will strictly look at planning. He said that:

"Strengthened planning. Budget must be informed by planning and monitor expenditure. If I plan to devolve R20, I must get a report on how was the R20 spent and how other people that I monitor are spending the R20."

Responded (Do-8) also purported that:

"Monitor the use of funds. People who were allocated funds must account. There should be reports and evidence."

Some respondents do not even see the need for AM. If and only if the budget can be managed well, the AM will be a thing of the past.

4.4 Conclusion

From the views of the respondents it becomes evident that the funds that are devolved to Districts and schools must be monitored. This will curb corruption and increase the level of accountability. The view of proper planning was also audible from the respondents. The need for filling of teachers vacant posts can never be overemphasized. Respondents from both schools and district were clear about the necessity of a teacher in every class. When basic

needs of the school and District are met then AM may be imposed to manage the budget at hand.

The next chapter will present a summary of major findings, conclusions, and recommendations to address the challenges due to Austerity Measures as well as suggestions for future research areas.

CHAPTER 5: CONCLUSIONS AND RECOMMENDATIONS

5.1 Conclusions

5.1.1 Introduction

The focus in the previous chapter was to analyse data and interpret findings. In this chapter therefore, the researcher will present a summary of major findings and recommendations to address the challenges due to the Austerity Measures (AM) in the Idutywa District. The main research problem statement is to study how government AM affect on-site school support for curriculum delivery. The researcher used the face-to-face interview method to collect data for this study. The sessions were recorded to capture accurate aspects of the respondents' views and to adhere to the issue of trustworthiness in data collection. Thematic analysis was used in this research to emphasize on studying themes within data. The limitations encountered in this study were as follows:

- There was a time-delay since the researcher is a full-time employee of the Department of Basic Education with a lot of responsibilities.
- The respondents are field workers and managers who are mostly out of the offices attending various meetings in the District or at Head Office. Thus securing an interview with any of them was a challenge.
- The researcher has limited her scope of research to Idutywa District officials and few educators whereas service delivery or failure thereof is felt by the schools and ultimately learners. This is because of the geographical vastness of the Province and the rural nature of the District.
- There are not many books written on this topic and the researcher had to rely on online literature for referencing. Most books concentrate on the Austerity Measures imposed on the country at large, not just at an institution hence the researcher focused on the effect of AM on other countries for literature review, other than South Africa. The effects of the imposition of AM in these countries were deliberated and compared to the South African situation.

This chapter will also include conclusions that address the following research questions:

- What is the effect of government spending Austerity Measures to the employees?
- What is the effect of government spending Austerity Measures to the on-site support of the curriculum delivery in schools?
- How do government Austerity Measures affect the learner outcomes?
- How can they be managed?

The research questions are based on the following objectives of the study:

- To find out how the imposition of the Austerity Measures affect the learner outcomes in the District.
- To investigate how the implementation of Austerity Measures affects the District employees.
- To recommend strategies and methods to manage Austerity Measures.

The chapter will contain references to outcomes in the previous chapter (chapter 4). It will be bounded by the evidence collected and will relate the findings to a larger body of literature in the topic including theoretical framework. Confirming and contradicting data will be thoroughly discussed (Simon 2011:4).

5.1.2 The Interpretation of findings

Bloom's (1956) highest level of taxonomy asserts that evaluation should be evident when reading the meanings explained by the researcher for significant findings. The researcher therefore compares each theme to literature findings with sources for similarities and differences. Meanings of any gaps or similarities to literature is critically evaluated and discussed for every theme and outline of what do the findings mean to the Department of Basic Education policy makers and the reasons for them to care about the results. The themes of the data analysis are linked to the objectives for this study as outlined in Table 2 in the previous chapter.

5.1.3 Theme 1: The rationale behind the Austerity Measures

The researcher established that the imposition of the Austerity Measures (AM) was not clearly communicated and as a result officials have come up with their own interpretations based on their past experience and the inconvenience caused by the AM. The basic reason for the

introduction of the AM is to reduce expenditure by the ECDBE government officials. This contradicts the Keynes theorists who advocated increased government expenditures and lower taxes to stimulate economic growth during the economic downturn. Keynesian theorists believe that if the demand for goods and services is increased during the economic crisis, the economy will be pulled out of depression. The belt tightening measures also affect the overall spending of the government which spills over to the service providers who are economically active.

The lower level employees were not considered when the AM were introduced. All they experienced was that their planned on-site school visits programmes could not take place, the subsidised scheme has been halted and respondents do not know for how long the AM are going to be implemented.

5.1.4 Theme 2: Interrupted plans of on-sites school support activities

As mentioned above, the plans of officials to visit schools were either delayed or cancelled due to AM. Durden (2011) asserts that in Greece the funding for education was reduced and education spending was cut by closing or merging 1,976 schools which led to reduced school support programmes. With the minimal support there was an increased learner dropout rate in the secondary education phase. In Dutsi District this will result, among other things, in poor performance in both Annual National Assessment (ANA) and the final National Senior Certificate results (Education Management and Information System (EMIS) 2014).

It stands to reason that the imposition of the AM affected the on-site support visit by the District officials.

5.1.5 Theme 3: The scarce resources

Ever since the economic crisis, between 2009 and 2013 in the UK, the target support for children fell by 21 percent due to the government Austerity Measures. The education departments have to develop multi-disciplinary teams to deal with learner, teacher and needy families' support in the schools. It became a common practice to find registered nurses, professionally trained informal and community educators and youth workers and counsellors in one school (Smith 2015). Table 4.7 in chapter 4 depicts that out of 64 vehicles that are required by Dutsi District only 14 are available and there is a shortage of 50 vehicles. This

is a huge constraint that hinders on-site school visits by the District officials. Even if they want to form the multi-disciplinary teams as is done in the UK, limited available vehicles hinders this activity.

The District also experiences shortage of printers as out of 9 that are needed only 1 is available. There is huge shortage of these items such as photocopying machines and laptops. The District therefore experiences huge shortages of resources due to the spending cut.

5.1.6 Theme 4: The morale of the employees

Richardson (2012) asserts that in Ireland assessment of the effects of Austerity Measures is not measurable only in terms of cuts in resources and limitation of opportunities for learning, jobs and personal development but also in terms of loss of morale for both individuals and their communities. In response to the Research Objective: “To investigate how the implementation of Austerity Measures affect the District employees.”, and the Research Question: “What is the effect of government spending Austerity Measures to the employees?” the respondents poured out the discontent they experience when they are to go to schools for on-site support activities.

The respondents in Idutywa purported that they have low morale because they cannot stretch themselves to the level where they want to be, due to the budget cut in their District. This finding agrees with Richardson’s (2012) statement.

5.2.7 Theme 5: Negligence in funding for GET Phase

In the USA, the reductions are designed to be indiscriminate, cutting everything from air traffic control to nursery schools (Appelbaum 2013). In the Eastern Cape more focus is given to the Grade 12 learners at the expense of all other grades more especially the Foundation Phase (FP). The AM has hit hard in this phase because the minimum funds that are decentralised to Districts by the Head Office, finances the Grade 12 activities.

The FP officials only get a paper budget and after they have planned their activities, they are then informed that funds are no longer available, hence their activities are never realised. Therefore teachers miss out on the deserved support and the learners suffer in the end. These learners go through to high schools lacking the primary background.

5.1.8 Theme 6: Challenges faced by teachers due to lack of onsite support

Educators were clear in their call for support by the District officials. There are areas in the syllabus that they are not confident in teaching and would like assistance of the Subject Advisors. The main issue was the shortage of text books. The teachers believe that if the Subject Advisors can do class visits, they can witness the plight they have in the classroom, for example 3 or 4 learners sharing one textbook.

In other Southern African Development Communities (SADC) the Department of Basic Education officials assess the learning materials and ensure that they are user-friendly, relevant to teaching and learning, adequate and appropriate to the educational level, and are available. They also look at the teaching methods and assess if they are meeting the level of a child, are interactive and integrated.

5.1.9 Theme 7: The learner outcomes

The General Education Modules (2000: 48) of the Southern African Development Community (SADC) outline the importance of on-site school monitoring and support as a means of helping the learners to maximise the gains from their learning experience. It assists teachers to sharpen their teaching skills, improve their delivery methodologies, develop their leadership skills and qualities, upgrade themselves professionally and academically and ensure goal achievement.

Lack of support by the District Officials, as well as poor communication came out clearly from the educators. There is also lack of basic resources such as text books. Three or more learners share a book. They take turns to take it home for studying. This affects the performance of learners at the end of the year which contravenes the first strategic goal for the Department of Basic Education – ‘To improve learner performance in all grades.’ Idutywa District has never achieved 70% and above matric pass rate. Table 5.1 illustrates the past seven years’ matric performance. It is only in 2013 where the District achieved 60%. The performance went down again in 2014. One anxiously awaits the class of 2015 performance which would be the second year of the implementation of the Austerity Measures.

Table 9: Idutywa Matric performance from 2008 to 2014 (District report 2014)

Academic year	Number wrote	Number passed	% passed
2008	2283	757	33
2009	3002	1304	43
2010	3146	1627	51
2011	3186	1617	50
2012	3188	1625	51
2013	3540	2152	60
2014	3418	1978	57.9

5.1.10 Theme 8: Teacher shortage

The Post Provision Norms (PPN) 2016/17 have been released to schools and two thousands two hundred and thirty three (2 233) schools have lost teachers due to their reduced learner numbers. Cluster B only has lost eight hundred and nineteen (819) teachers in 2014/15. The principals of schools are not taking kindly to this at all. There is a concern that 2016 will start on 'shaky grounds' because the teacher unions are threatening to stage a protest against the reduction of teacher numbers in their schools. The principals started by staging a 'walk-out' at the meetings organised by the MEC to address this teacher reduction issue (Principals' Meeting: 14/12/2015).

Teacher shortages is a burning issue in the Eastern Cape Department of Basic Education (ECDBE). The Circuit Managers' role is to ensure that schools are functional. For the schools to be functional there must be learners and adequate teachers in every class. That is not the case in ECDBE.

5.1.11 Theme 9: Counter productive

Many respondents agreed that the imposition of austerity measure will result in the savings by the Department of Education but the core business – which is teaching and learning, will suffer. Some respondents believed that if the schools and Districts had basic resources as specified in table 4.6 'Proposed Minimum Resource Package', the AM were not going to be detrimental to the poor Districts like Idutywa.

5.1.12 Theme 10: Alternatives to Austerity Measures

The respondents have cited high levels of corruption and lack of monitoring and evaluation of the departmental processes. These, they said, may have led to the introduction of AM. They have also mentioned the non-implementation of consequence management in the department as a whole. Officials get away with lots of wrong doings without any punishment for their actions.

5.2 Recommendations

The research problem of this study is the assessment of government spending Austerity Measures in on-site school support for curriculum delivery and the District of focus was Idutywa. The data analysis in the previous chapter clearly presented a picture of ‘doom and gloom’ in this District. It is time for the Provincial Office to rethink the implementation of these Austerity Measures. It seems, based on analysed data, that the core objective of the department will be partially achieved. Out of the four sections in the District, only one is partially resourced in terms of transport allocation. None is fully resourced in terms of the basic need of the office-based employee and the school educator.

Since the Austerity Measures are already in place and the damage has already been done, the researcher makes the following recommendations to the Department of Basic Education which are based on the researcher’s findings:

- Since the major challenge that the District Officials are faced with is the un-availability of transport, the Provincial Office must either revisit the suspension of the subsidised car scheme or increase the number of GG cars. A comparison must be made in terms of cost of both schemes. The Departments must go for the cost effective scheme. Availability of transport will ensure that field workers are at work and the educators receive the support they deserve.
- In terms of the shortages of tools of trade, which has resulted in low morale of the District Officials the Provincial Office must decentralise asset funds to Districts so that they procure per amount decentralised per annum up to the point where every employee has the basic tools necessary for effective supporting and monitoring of the schools. Table 4.6 in chapter

4 has outlined these basic tools. The District must update the Provincial office on the progress made on resourcing the officials.

- The Province must audit the resources in the Districts. Managing the Austerity Measures will depend on the outcome of the audit.
- To improve Learner performance, District Officials must report monthly on the findings from the schools as well as corrective measures if necessary.
- Provincial Office must ensure that learners do have teachers, textbooks and the resources needed by the learners.
- When funds for the Foundation Phase are decentralised to the Districts, they must be utilised for the benefit of the Foundation Phase teachers. The activities planned for the Foundation Phase must be carried out. The learners with good foundation will perform better in the higher grades

5.2.1 Recommendations for Further Studies

Further research may be made to assess the performance of learners when the necessary resources are made available, that is:

- The required learner support materials
- Teacher for every class and
- The necessary school furniture

It may be interesting to research the effect of Austerity Measures on other Government Departments. The former Minister of Finance, Nhlanhla Nene, was clear about the fact that South African will have ‘to do more with less’ (Financial Report: 2015)

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APPENDIXES

Appendix 1: Letter to the District Director - Idutywa



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09 September 2015

Idutywa Education District

Dear District Director

This letter serves to request the permission to conduct research in your District. The title of the research is: **“ASSESSMENT OF GOVERNMENT SPENDING AUSTERITY MEASURES IN ON-SITE SCHOOL SUPPORT FOR CURRICULUM DELIVERY.”** This study is being conducted by me, **MRS LOMBO**, a student in **Masters of Public Administration** from the Department of **MANAGEMENT AND COMMERCE** at **UNIVERSITY OF FORT HARE**. The respondents will be:

1. Officials from your District that are responsible for monitoring of schools in terms of curriculum delivery and
2. The educators from the underperforming schools.

The purpose of this study is to assess how the imposition of austerity measures is affecting the on-site support activities given by the District officials to the schools and hence the learner performance.

This survey has been approved by the **UNIVERSITY RESEARCH ETHICS COMMITTEE (UREC)** of the **UNIVERSITY OF FORT HARE (UFH)**. There are no risks associated with participating in this study. The survey collects no identifying information of any respondent. All the responses in the survey will be recorded anonymously.

While you may not experience the direct benefits from participation but the information collected in this study may benefit the Department on how to manage the austerity measures in the future.

If you have any questions regarding the survey or this research project in general, please contact my supervisor, Dr. Mle at: tmle@ufh.ac.za or call 0822003475. If you have any questions concerning your rights as a District, please contact the UREC of UFH University at 040 602 2297.

The questionnaire is attached so that you can familiarize yourself with the issues to be discussed. I undertake to use the information provided for the purposes of this research and to treat it with the strictest confidence.

By completing and submitting this survey, you are indicating your consent to participate in the study. Your participation is appreciated.

NOMACHULE LOMBO Masters Candidate, UFH

Appendix 2: Interview Schedule for the District Officials

THE EFFECT OF THE IMPLEMENTATION OF AUSTERITY MEASURES IN THE EASTERN CAPE DEPARTMENT OF EDUCATION

The Department of Basic Education- Eastern Cape has been subjected to cost cutting measures commonly known as the 'austerity measures'. With present economic conditions and the continuous announcements by the Member of the Executive Committee (MEC) for Education that the officials must plan to do more with less, it is evident that the austerity measures are here to stay.

There must be ways and means to manage this situation. Hence the researcher find it necessary to sought after from the education officials who are directly affected by these cost cutting measures to voice their opinions on dealing with this issue.

By responding to these questions you will be making an important contribution to the debate about the root cause of austerity measures in education and, ultimately, the future in managing their implementation. Your responses will also assist in determining the impact of the austerity measures to the Education Districts' staff and ultimately the learner. The results of the survey together with the recommendations will be sent to the Head of Department (HOD) and the Chief Financial Officer (CFO) before the new financial year. This, I hope, will influence their financial decision-making in terms of allocation of funds and the procurement processes.

Your name will not be written on the interview schedule to ensure confidentiality.

I thank you most sincerely for your time.

A. GENERAL INFORMATION

1) Section _____ Position _____

2) Gender _____

3) How many schools do you plan to support per month?

4) How many schools do you manage to support per month?

5) If the answer of number (3) is not equal to the answer in number (4) above then state the reason/s for deviation from the planned target.

6. What kind of on-site school support activities do you provide to the schools?

B. YOUR RESPONSES AS TO HOW THE DEPARTMENTAL AUSTERITY MEASURES AFFECT PROCESSES AND PROCEDURES IN THE DISTRICT.

1. Since 2013, the Department of Education is implementing austerity measures in its processes. What do you think is the reason for these measures?

2. Do the austerity measures affect your on-site school support activities? Explain your answer.

3. Do the austerity measures affect you, as an official in the District? Explain your answer.

4. The austerity measure will be the order of the day in government. How do you think they may be implemented?

5. Do austerity measures affect budgeting for your programmes? Explain your answer

6. Do you think the austerity measures produce the desired results? Explain your answer.

7. If you were a policy maker, what policy alternatives would you put in place to curb the government over expenditure?

Date completed _____

Thank you for your help.

Appendix 3: Interview Schedule for the Schools Officials

THE EFFECT OF THE IMPLEMENTATION OF AUSTERITY MEASURES IN THE EASTERN CAPE **DEPARTMENT OF EDUCATION**

The Department of Education- Eastern Cape has been subjected to cost cutting measures commonly known as the 'austerity measures'. With the present economic conditions and the continuous announcements by the Member of the Executive Committee (MEC) for Education that the "officials must plan to do more with less", it is evident that the austerity measures will be implemented for quite some time into the future. The Programme Managers have to reprioritise their activities over and over again to match the allocated budget. This, among other things, affects the activities that were planned to support schools.

The researcher found it necessary to investigate from you, as a school official who is supposed to be receiving the planned support from the District, how are these austerity measures affecting you.

By responding to these questions you will be making an important contribution to the debate about the effect of austerity measures to your school and, ultimately, the final performance of your learners. Your responses will also assist in determining the impact of the austerity measures to your Education District. The results of the survey together with the recommendations will be sent to the Head of Department (HOD) and the Chief Financial Officer (CFO) before the new financial year. This, the researcher hopes will influence their financial decision-making in terms of allocation funds to the school support activities.

Your name will not be written on the interview schedule to ensure confidentiality.

I thank you most sincerely for your time.

A. GENERAL INFORMATION

- 1) State the position you hold in the School (e.g. Principal, HOD or Educator, etc.) and years of experience in teaching.
- 2) What subject/s do you teach?

3) In which grade/s do you offer each subject?

#	Subject	Grade / s
1		
2		
3		
4		

B. YOUR RESPONSES ON THE FREQUENCY AND THE QUALITY OF SUPPORT YOU RECEIVED FROM THE DISTRICT OFFICIALS DUE TO AUSTERITY MEASURES.

1. How often does a District official visit your school to support you?

2. What kind of on-site school support activities do you receive from the District officials?

3. What was the average learner performance rate in your subject for the final examinations in 2014?

4. What kind of support do you need from the district to improve your learner performance?

5. Do you get adequate support from the District officials? YES / NO If not, what challenges do you experience in your teaching due to the lack of / minimum support from the District?

6. The austerity measures were imposed in order to curb over expenditure by the Department of Education. If you were a policy maker, what policy alternatives would you put in place to curb the government over expenditure?

Date of the interviews _____

Thank you for your help.