

UNIVERSITY OF CAPE TOWN

FACULTY OF EDUCATION

**Teacher responses to Rationalisation
in the Western Cape Education Department :
Implications for Administration
Planning and Policy**

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March 1998

**Research Report submitted in partial fulfilment
of the requirements for the degree**

**MASTER OF EDUCATION SPECIALISING IN
EDUCATIONAL ADMINISTRATION PLANNING AND SOCIAL POLICY**



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ACKNOWLEDGEMENTS / APPRECIATION

I would like to thank the following people ...

1. My wife, Thoraya and my children, Souchan, Mogamad Yaqeen, Mogamad Meeka'eel and Mogamad Yushaa for their motivation and support.
2. My supervisor, Dr Crain Soudien for his dedicated support and encouragement.

DECLARATION

I, Mogamad Labeeb Gasant, hereby declare that this research report is my own work and that it has not been submitted before any other institution for the purpose of assessment.

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DATE

ABSTRACT

Apart from its current application in the process of transformation of South Africa's education system, interestingly, the term **rationalisation** is absent from the international literature.

The high level of impact that the economics of education has in the provision of education presupposes that, in the "Global Village", world trends and access to international financial markets to fund transformation in education will inform the national policy making process.

In South Africa macro education policy is set by the National ministry. In this regard teacher / learner ratios and funding to the provinces have been set at the highest level of government. In terms of this, it is understandable that national imperatives will influence and in many cases determine provincial policy making and the implementation thereof.

This study examines educator responses to the way in which the rationalisation of teacher numbers is being applied in the Western Cape Education Department (WCED).

The investigation takes into cognisance the particular historical, political and social background of the Western Cape Province. In doing so this study recognises the influence that these factors have had on the way teachers view the rationalisation policies and, more importantly, their implementation.

In the apartheid era education was organised, according to "race", into four different departments. Thus the Department of Education (DET) controlled "Black" education, the Cape Education Department (CED) controlled "White" education, the House of Representatives (HOR) controlled "Coloured" education and the House of Delegates (HOD) was responsible for "Indian"

(iv)

education. Since the number of HOD teachers in the WCED only constitutes 0,47% of the total [WCED, November 1995], they were not taken into consideration for this study.

While there is a convergence of opinion by educators of the three ex departments on many issues regarding rationalisation there is also a noticeable divergence underpinned by historical difference in funding and human and physical resourcing.

Conclusions drawn point to the fact that there is a general acceptance of the policy of the rationalisation of teacher numbers in the Western Cape. Yet, while this policy might promote equality of numbers, its merit as a means to assuage the demand for the equitable redressing of the injustices of the apartheid era remains questionable.

CONTENTS

Acknowledgements	(i)
Declaration	(ii)
Abstract	(iii)

CHAPTER 1 : SETTING THE PARAMETERS Page 1-15

1. Introductory Remarks
2. The Key Issues
3. Obstacles to the Reform Process
4. The Provision of Equality and the Demand for Equity
5. Teachers - The Vital link
6. The Research Question

CHAPTER 2 : THE LITERATURE REVIEW Page 16-25

1. Prevailing Paradigms
2. How the problem is conceptualised
 - 2.1. Politico-ideological Discourses
 - 2.2. Economic-efficiency Discourses
3. What Emerges

CHAPTER 3 : THE RESEARCH METHODOLOGY Page 26-31

1. Research Design
2. Data Sources

CHAPTER 4 : FINDINGS Page 32-48

1. Presentation

CHAPTER 5 : ANALYSIS OF FINDINGS, CONCLUSIONS Page 49-57**AND RECOMMENDATIONS****FOR POLICY MAKING**

APPENDICES :	A : Questionnaire	Page 58
	B : Letters	

REFERENCES	Page 59-65
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CHAPTER 1

SETTING THE PARAMETERS

1. Introductory Remarks

In global terms, the non-military transfer of power to the black majority in a perilously divided South Africa and the subsequent implementation of a relatively peaceful process of transformation is quite unique.

Given this situation, it is not surprising that the research record with respect to transformation of this type is scant. This is unfortunate because as many South Africans are becoming aware, the difficulties of rebuilding themselves as a new nation are complex. Nowhere is this better illustrated than in educational reconstruction, where the subject of creating a single education system where previously eighteen existed is fraught with problems.

This dissertation is concerned with one aspect of the process of rebuilding and re-configuring the education system, ie - the rationalisation of the teacher corps. It is specifically interested in teacher responses to this unfolding development and their implications for policy making. How do teachers in the system understand and conceive of the process of rationalisation ? To answer this question it is important to understand the context in which rationalisation has occurred.

The Background

When South Africa became a democracy in 1994, it inherited a deeply skewed educational system. Resources were distributed in the 'old' apartheid system according to race, which produced a schooling system where, at the one end, white schools were over-provided for and at the other end black schools profoundly under-provided. In between these two bands 'coloured' and 'indian' schools were also provided for at differing levels.

The challenge of the new government has been to address these inequalities. The response of the government has been to develop new policy for school governance and resource distribution. Important legislative developments in this regard, include the White Papers 1 and 2, the South African Schools Act

of 1997 and amongst others, Government Gazettes No. 16814, and 17226. These developments have impacted heavily on the character of the system inherited from apartheid. For the purposes of this dissertation, a most important decision has been the equalisation of funding across the system. Where previously the system was structured around a hierarchy of funding and resourcing, the intention has been to take resources from over-endowed areas and to place them in under-resourced areas. The teacher-learner ratio has been a major focus of this process labelled The Teacher Rationalisation process. As a result of a national teacher audit, it has been discovered that the Western Cape is the most advantaged province in the country. As a result, it has had to lose 12000 teachers over a period of five years.

This dissertation seeks to understand how teachers themselves have responded to this process. On the subject of reduction in force or 'cut-back management', ample reference can be found in the private sector where 'layoffs' and retrenchment based on cost-saving and efficiency have their own institutionalised sphere of expertise and knowledge. The rationalisation of the distribution of teachers, however, on a **national scale** has few precedents.

Where the origins of the plans for restructuring / right-sizing lie are, therefore, difficult to place with any accuracy. There is a common sense view amongst many teachers that the process has been motivated by agencies such as the World Bank. This view is supported by Graham-Brown, [1991 : 18] who suggests that the rich nations are insisting that the developing worlds' "... education systems must match their resources, or lack of them " [ibid, 3] and that "... they need to adjust the entire education system towards the needs of a market economy " [World Bank Review, 1995 : 137].

The scope of this dissertation is such that these issues cannot be addressed in their whole complexity. While the focus of the research is on the responses to rationalisation of educator numbers in the Western Cape Province, it is important to note that financial, economic and political factors at a provincial, national and international level influence and give substance to the implementation processes that shape rationalisation.

Thus the broad context in which rationalisation in the Western Cape takes place, finds links in the moulding of policies which in turn informs the processes of implementation at provincial level. The concept of rationalisation is, therefore, a complex one - more so in the case of South Africa since it is

allied to the process of political, social and economic transformation to a democratic dispensation. Since there is a commonly held view that education is an important vehicle for transformation, it is important to understand the key issues which underpin its transformatory role.

2. The Key Issues

Much reliance is being placed in South Africa, as elsewhere in the world, on the capacity of education to bring about or facilitate social development.

General conclusions emanating from World Bank reports see education as fulfilling a number of essential objectives viz.,

"... satisfying a basic human need for knowledge; providing skilled manpower; developing the productive capacities of the labor force; determining present and future incomes and employment; influencing health, fertility and life expectancy" [Psacharopolous & Woodhall, 1985 : 321].

In line with this premise, the perception that education is "... the panacea for all social and economic ills" [Graham-Brown, 1991 : 3] is firmly entrenched in the South African reform proposals for education. The Education White Paper 1, for example states that "..... Education is a key to the realisation of the socio-economic programme of the government " [1995 : 61-66].

As a consequence of this discourse and the ideological priorities and strategies relating to the "socio-economic transformation" function of education, it is necessary to investigate the conduits through which this change is assumed to be effected and evaluate the prerequisites for the realisation of this goal.

A recurrent theme in the Education White Paper 1, [1995 : 5-20] is that "Education and Training are ... of vital interest to ... the prosperity of our national economy ... a matter of national importance second to none ... (and that) ... human resource development ... (must drive) ... the reconstruction and development of our society and economy." Simon McGrath [1995 : 1-2], in examining the context in which South Africa's Education and Training policy is seated, highlights the two priorities accentuating economic development - "pro-capital" and human resource development - "pro-labour." He emphasises the inherent tensions between these two especially if they are fused into a policy which

attempts to integrate **education and training**. The "tension", he asserts, stems from South Africa's location in the 'global economy' which he, and others like Wallerstein, identify as being 'semi-peripheral' (Developing) as opposed to 'core' (Developed) [ibid].

It is when "developing" nations take on board discourse policies based on the projected outcomes of a fully fledged "core" market economy that Carnoy and Samoff also ring a bell of caution in warning that the "... uncritical adoption of external models ... in a world dominated by capitalist financial institutions ... with their dominance of technological creativity ..." could hamper educational expansion and reform and lead to slower than expected progress towards social transformation goals [ibid].

South Africa is experiencing genuine and deep-rooted problems not only as a result of the disastrous legacy of past inequalities but the present and very prominent predicament of a slow growth rate, high unemployment and a lack of the institutionalised checks and balances to curb corruption and mismanagement.

Notwithstanding the most noble of educational plans, such conditions could seriously retard prospects for socio-economic transformation and could lead, in fact, to social discontent.

Harold Wolpe [Unterhalter, Wolpe & Botha, 1991 : 8-16] cautions that "...in the absence of coherent development strategies, ... education and training may contribute only to a highly limited degree to a process of social transformation" What Wolpe and especially Saleem Badat [ibid : 20-21] are wary of is the wholesale adoption of policies and strategies for the (South African) masses who are "... not undifferentiated but are fractured by race, class, gender and other divisions."

The significance of these viewpoints is underscored by Wolpe and Unterhalter when they emphasise "... the impossibility of assigning a transformative role to education functions without considering the social, and economic conditions in which those functions may become effective" [ibid : 8].

The views expressed above seem to suggest that due cognisance has to be taken of the impact that the enormous structural inequalities have had on the current socio-economic condition of the nation and, by

implication, the need for this to be addressed in a deliberate and circumspect manner. Inherent in this need is a demand for recognition of the pivotal role that **equity** plays in socio-economic reconstruction.

The key component that underpins and proscribes these issues is **economics** and the **financing** of education transformation.

3. Obstacles in the Reform Process

The Financial Equation

In the current discourse, it could be argued that proposals to accommodate social transformation theories through the setting of priorities and the formulation of strategies for education, are rooted in the economic sphere.

In this respect "reform prescriptions" for education, aimed at eradicating "racial capitalism" in South Africa, have tended to be based in "... responses to quantitative changes in the economy " [Nkomo, 1990 : 301] and dominated by 'economic imperatives'. This is manifest in statements by the minister of education in his message published in The Cape Argus : " We have to live with the present funding levels ... and accept ... (it)... as reality ... to develop a scenario regarding the number of teachers that could be afforded ... The situation may change if the economic growth rate is higher or lower than 3% " [12 June 1996]. There is a strong indication that the rationalisation of the distribution of teachers and the equalisation of teacher / learner ratio's is an outcome of this policy.

While this approach might be the result of economic necessity, it induces the propagation of an education system dependent on the vagaries of the economy and encourages 'quick fix' solutions to mend "structural inequalities" built up over decades of apartheid practice [ibid].

In this respect, Cream Wright [1989 : 86] of the CREST Research Centre in Sierra Leone warns that the "... worst effects of ... cost saving measures in education will somehow be passed on to the weakest socio-economic groups, thereby reversing hard won gains in the democratization of educational opportunities."

The dominance of financial considerations in setting the agenda for education is manifest in a tendency for deploying "cost-benefit", "Rates of Return" and "Input and Outcomes" frameworks. The essence of this priority setting is suggestive of guidelines worked out by international role players like the World Bank who, in its 1995 Education Sector Review, expressed a preference for private and social rates of return to be seen as a measurement of the economic outcomes of education expenditure [Bennell, 1995 : 1].

While the kind of analysis being called for does have its merits the reality of the South African situation is that "... only 6% of male and female blacks ... (the vast majority of the population) ... have received post-school qualifications, compared with 73% of white males and 67% of females ..." [Sunday Times : Business Times, December 1, 1996]. In view of these disparities government's proposal to set provisioning scales for education at somewhere between (the previously disadvantaged) ex DET (Black schools) and the (previously disadvantaged) ex HOR ("Coloured" schools), [White Paper 2, 1996a :], seems contrary to "... Constitutional requirements, reinforced by government policy, ... (which) ... require that **equity** becomes a basic principle of budget strategy." [White Paper 1, 1995 : 61].

In this regard the South African Democratic Teachers Union's statement highlighting "A Lack of financial resources to address and redress imbalances in education " [Chalkline, 29 May 1997 : 1] indicates that government's implementation of education policy is not adequately addressing its agenda to "... radically reform the budget to address the dimension of **equity**" [White Paper 1, 1995 : 62].

Funding and Policy

At the heart of an equitable policy is the budget for education and **the way in which it is utilised** to realise the development required for socio-economic transformation. At present levels the budgetary allocation to education which totals R31.8 billion (+/- 22,5% of the budget) represents about 7% of Gross National Product (GNP) [White Paper 1, 1995 : 62-63]. Compared to 'global norms' such a level of expenditure would seem adequate to support socio-economic transformation. It is, however, the manipulation of the budget which gives life, in a structural sense, to policy priorities to address the concerns of equity expressed in Education White Paper 1.

The practical implementation of budgetary policy has seen a difference with regard to the way in which the key aims of equality and equity are perceived. Even though, as Gilmour [1997 : 5] highlights, "... differences in teaching qualifications and therefore salaries and costs ... differences in capital expenditure ... differences in curricula ..(and).. differences in quality ..." are visible, "... practical formulation has generated shifts that may not achieve these aims " [ibid, 7].

It would appear then, that government's policy to equalise teacher / pupil ratios as a measure to achieve equity could be problematic since these two terms are not interchangeable (as is indicated below) and it is important that these concepts be set apart.

4. The Provision of Equality and the Demand for Equity

More than "equality", the question of "EQUITY" is at the heart of the political, social and economic need to transform education provision for the vast majority of South Africa's currently still disadvantaged masses. Its need for prominence, high priority and publically noticeable delivery is pivotal to lift the country out of the "Post Apartheid / After Effects" mindset into a more visible and deliberate transformation phase.

Walter Secada's equating of equity with **social justice** [1989 : 81] is a terse reminder of the fundamental difference between equity and equality, i.e. "... equity is a qualitative property while equality is quantitative " [ibid, 82]. He further explains that the "... heart of equity lies in our ability to acknowledge that, even though our actions might be in accord with a set of rules, their results may be unjust " [ibid,68]. In relation to this, "Groups that have been historically discriminated against in employment opportunities may need to be ... overrepresented ... to overcome (past) employment discrimination " [ibid,78]. The legitimacy of such a policy, he postulates, cannot be debated "... in terms of equality of education; its terms are too restrictive " [ibid, 78]. Clearly, Secada relates equity with affirmative action and justifies its utilisation as a measure to effect social justice.

In terms of this, Minister Bengu's response that "... Equity was not related to affirmative action. ... All that equity says is that we reduce the budgets of the provinces that were funded above average and increase the budgets of those that were funded below average " [Weekend Argus, 8/9 March 1997 : 22] suggests a policy of equalisation without justice. While he emphasises that "The paramount task is to

build a just and equitable system ..." [White Paper 1, 1995 : 17], Gilmour suggests that he has recast the concerns of equity to "... the technical level ... of rearranging numbers, financial and human, being more accurate in these allocations, and properly implementing the policy " [Gilmour, 1997 : 13].

Walter Secada's response to Minister Bengu would be : "Yes, But is Equality Just?" [Secada, 1989 : 75]. He may be inferred to suggest that the equalisation of teacher pupil ratios might address quantitative issues in the system but questions whether it can **adequately** confront the broad qualitative predicament. Using Secada, it might be that if we fail to ask whether or not the teacher pupil ratio is **just** in what it legitimates, we may well achieve equality of education, but it seems highly unlikely that the equality view will represent a **just** teacher pupil ratio [Secada, 1989 : 75].

In the light of what Secada is saying it would appear that if meaningful education strategies for transformation are to be developed, the importance of adequate and affirmative teacher provisioning and training needs to be recognised. There needs to be acknowledgement that the legacy of the past - which left the majority of teachers "An ill-qualified, disaffected teaching force, working in poor conditions and constantly short of money ... " [Graham-Brown, 1991 : 272] - has to be addressed in an equitable way in the process of implementing change.

5. Teachers - The Vital link

A key element of the debate around the transformative role that education has to play are teachers. They are pivotal to improving the quality of input so as to realise the **Lifelong learning and Development** aims of curriculum revitalisation. While the state has various options at its disposal to achieve equity, the alternative that it has chosen is centred on the setting of national teacher : pupil ratios.

The Teacher : Pupil Ratio

Teacher : pupil ratios are used as a tool in educational planning because of their apparent simplicity. While there is much debate concerning the influence that `ratios have on quality of education, what is ultimately acceptable will depend largely on the education budget [Unterhalter, Wolpe and Botha, 1991 : 188].

The risk in utilising aggregated, overall ratios, is that they conceal a number of complications and wide variations with regard to particular problems [Atkinson, 1983 : 74]. In the South African situation Atkinson's concern is crucial since the new government has not only had to desegregate education but also make provision for colossal racially motivated imbalances in teacher provisioning and resourcing.

While it emerged in the formulation of education policy for South Africa that "... equality of education requires compensating additional provision of ... resources for children from disadvantaged backgrounds ..." [NEPI : Education Planning, System, and Structure Research Group, 1993 : 41] it appears that financial constraints precluded substantial interventions of this kind in determining teacher : pupil ratios. Indeed, it seems that this trend is set to continue, since : "In a projection to the year 2010, it was found that the country would hardly be able to afford learner : educator ratios of 35:1 in secondary and 40:1 in primary schools" [Message from Minister of Education, Cape Argus, 12 June 1996].

The effect of the application of a 'national norm' with regard to teacher : learner ratios meant that the entire sector had to be right-sized. This meant rationalisation on a national scale and the planned redeployment of teachers to areas where they were needed - in the previously disadvantaged regions of the country where the teacher : pupil ratios were critical.

Four components are at the heart of the technical process of effecting the national norm in teacher : learner ratios of 40 : 1 for primary schools and 35 : 1 for secondary schools by the year 2000. These components are : **Rationalisation, Right-sizing, Retrenchment and Redeployment.**

Rationalisation

While it was widely accepted, also by the previous regime, that there needed to be rationalisation of the widely disparate teacher : pupil ratios, putting implementation theories into practice is proving to be problematic.

The theoretical framework of applying an 'equal' teacher : pupil ratio and redeploying the excess teachers from advantaged areas to the disadvantaged ones so as to effect 'equity' was negotiated in the Education Labour Relations Council (ELRC). Even though this 'agreement' was reached through consultation with the major role players in labour, the fact that there existed virtually no precedence on a world-wide level

and that no prior impact study was undertaken, meant that it would tend to be technical in nature. However, while the minister of education felt that "... the redeployment of teachers had been dealt with in a very sensitive manner ..." [Cape Argus, 12 June 1996], the impact of rationalisation and redeployment on a society deeply divided on different 'racial' levels could not be amply effected on a purely technical plane.

Greenhalgh and McKersie in Public Administration Review, while acknowledging the possible political appeal, warn of the negative impact of issues which tend to "... blur the distinction between outcomes and the processes by which they occur ..." [1980 : 575].

Thus, the political gains of an 'equal' teacher : learner ratio and subsequent rationalisation has costly side-effects mainly resulting from the interpretation of equality in terms of inequality and as a subsequent 'aggregation of differences' [Secada, 1989 : 69]. This is borne out by official explanations from educational authorities citing "equity" as the "... removal of inequalities ...(and) ... removal of discrimination ..." [Western Cape Education Department Annexure, dated 10.04.96]. In a succinct juxtaposing of 'equality' and 'equity' Secada asserts that "... even though our actions might be (technically) in accord with a set of rules, their results may be unjust ..." [ibid, 68].

While, technically, rationalisation appears uncomplicated to effect, the process of redeployment and its precursor, the formation of right-sizing committees, is a highly emotive and politically charged exercise striking at the heart of school organisation.

Right-sizing

Western Cape Education Department circular 0051/1996 defines right-sizing in terms of "... determining the optimal number of staff required to render a service bring the number of employees to the desired level ... in a manner which enhances the principle of equity ..." [WCED circular 0051/96, dated 21 May 1996].

Clearly, the above interpretation indicates an exercise of 'adding' or 'subtracting' teachers depending on which side of the 'equity' line the institution falls. While its demerits have been previously dealt with, its effects will depend on the capacity of schools to cope with change quickly and efficiently. Though

it might seem as if those who are compelled to 'down-size' are in a more disadvantageous position, the converse, as previously indicated in comments by Cream Wright, is probably more the case. It would seem that the depth of deprivation of the previously disadvantaged, notwithstanding their apparent increase in personnel, cannot be rectified only by technical maneuverings to effect 'equality'. In this regard the claim by, amongst others, the South African Democratic Teachers Union, that the rationalisation process was a "... fundamental step towards implementing the principle of equity in education ..." [SADTU Press Release, dated 18 March 1996] needs more careful investigation.

In fact, the possible negative impact of the above scenario has been somewhat exacerbated by reports on the national television that government was planning to introduce an amendment to the Education Act which would allow school governing structures to "purchase" extra teaching staff -should they be financially able to do so. This, in effect, could mean that previously well-off (white / Model C) schools could be in an advantageous position since they, and the communities they serve, would most likely have the financial resources to essentially widen the "quality" and "standards" gap in education. This could lead to the demoralisation of disadvantaged and financially impoverished parents and it could be inferred that those who are financially able will receive the "best" education. In addition it would appear to negate the teacher : pupil ratio as a national norm and could be construed as an admission that the teacher : pupil ratio was in fact not conducive for achieving significant growth in the social transformation process.

Adjunct to the above, the process of the implementation of right-sizing involves, in addition to attending to the curricular needs of the school (which could be applied in an arbitrary manner), the principle of "Last in First Out" (LIFO) which could result in the loss of younger members to the profession.

Retrenchment

The State President, Mr Nelson Mandela, has on many occasions in the media, promised that : "While I am president, no teacher will be retrenched." While this might sound reassuring, the common sense view amongst educators is that the situation with regard to the implications of rationalisation in the Western Cape makes this highly unlikely.

While Government Gazettes No 17226 and 16814 do not use the term retrenchment, much is made of the principle of **Redundancy and Termination** - which in effect have the same intention as that of retrenchment. Gazette number 16814 states that : "Should all measures to suitably absorb an educator fail, despite co-operation on his or her part, notice must be served on him or her that his or her services are to be terminated in terms of section 8 (1) (b) of the Educators' Employment Act, 1994" [Government Gazette, 16814 : Pretoria, 13 November 1995 : paragraph (f), page 5].

Notwithstanding the president's promises to the contrary, the documentation concerning the implementation processes of rationalisation warns of impending **retrenchment**. This is borne out by WCED circular 0099/1997, from the Head of Education in the Western Cape, cautioning that permanent staff who have been declared in excess would have the choice of "... 3.4.1. either taking the VSP, or ... 3.4.2. being redeployed ...(but) ... that these options for such permanent teachers could change should **retrenchment** (my italics) be re-introduced" [Annexure B : Point 3.4.].

This caution is further exacerbated by persistent media reports of the impending **Retrenchment** of thousands of teachers in the Western Cape Province [Cape Argus, 14 January 1998 : 3].

As a result of previous racially based provisioning, the Western Cape has an over-supply of human resourcing. Added to this, there is resistance to redeployment to other provinces. In terms of this, retrenchment / redundancy / termination , signifies a loss of employment in any form and would seem a real possibility to many teachers in this province.

Since these possibilities were first mooted, large numbers of teachers have already lost their jobs. A possible 3600 temporary teachers in the Western Cape were to be "fired" from their jobs at the end of March 1998.

Redeployment

In terms of Government Gazette, Volume 365, number 16814, redeployment involves the "... suitable placement of an educator elsewhere in the education sector in terms of the Educators Employment Act, 1994 ..." [Pretoria, 13 November 1995 : 6].

The aim of the fore-mentioned government regulation was to shift human resources from areas which were historically over supplied to areas which were under-resourced as a result of the discriminative policies of apartheid. The policy was developed on the premise that redeployment would eliminate local, regional and provincial discrepancies and equalise teacher provisioning throughout the nine provinces. The criterion used for guiding the implementation of the policy was that of achieving what the National Education Ministry claimed standard teacher / learner ratios throughout the country.

To facilitate this process each province had to draw up a redeployment list of educators who were in excess (against the set ratios) at their schools. Those teachers who wished to leave the profession were offered Voluntary Severance Packages (VSP) in order to alleviate the problem of having to redeploy vast numbers of teachers.¹

On a provincial basis the Western Cape was, during the apartheid years and even as recently as the 1995 / 96 financial year [Cape Argus, 12 June 1996], the best resourced province in the country. As a result of the post apartheid National Government setting the funding for education at between the levels of the previous DET and HOR levels (mentioned elsewhere) and the fact that ex HOR (63,7%) and ex CED (26,3%) teachers constituted 90% of the those employed in the Western Cape [WCED, November 1995], it follows that this province would have the biggest problems with regard to right-sizing of teacher numbers.

With ex DET learners constituting only 15% of the total number for this province [WCED, November 1995], the Western Cape faced the problem of having to declare 12 000 teaching posts in excess and placing teachers on the redeployment list for transfer to other provinces or to fill vacancies occurring as a result of natural attrition or the taking of the VSP.²

¹ The ratios of 40 : 1 for primary schools and 35 : 1 for secondary schools were recommended after consultations and negotiations in the Education Labour Relations Council (ELRC). These deliberations were guided by the parameters of Education White Paper 2 of 1996 which manifested the influence of "outside" consultants like Colclough (University of Surrey) and Luis Crouch.

² Taking into consideration that the province enjoyed human over-resourcing and given the need of the vast majority of staffs to "downsize" to meet the newly set teacher / learner ratios, the filling of "sufficient" vacant posts to redeploy 12 000 teachers would be improbable.

Attempts by the national education ministry to force schools to take on teachers from the redeployment list where they had vacant posts ended in the High Court. In the case brought to it by The Grove Primary School, the court decided in 1997 that the Minister's actions diminished the right of the school's Governing Body to appoint teachers. This action had a negative effect on redeployment policy and, coupled to the fact that most provinces had not drawn up redeployment lists or declared vacant posts for redeployed teachers, halted the redeployment process.

A report in the Educator's Voice, the official newspaper of SADTU (the largest teacher union and, as a member of the Congress of South African Trade Unions (COSATU), an ally of the government) stated that : "... Grove won the case. This threw rationalisation into disarray. Teachers on the redeployment list were no longer guaranteed employment. Retrenchment reared its ugly head" [November 1997, Vol 1 No 2 : 12].

The Minister of Education's attempt to "circumvent" the court's decision by introducing legislation giving him the right to appoint teachers seems to have brought little relief.

The present status of redeployment in the Western Cape is that, as a result of administrative problems with regard to facilitation of the redeployment process and the fact that the phasing in of national teacher / learner ratios is incomplete, very few teachers have been redeployed in the Western Cape and, indeed, in other provinces. Also, a resistance on the part of teachers to declare themselves available to be transferred to other provinces has seriously disabled the process. This has impacted negatively on the implementation of the rationalisation of teacher numbers as set out in the White Paper of 1995.

6. The Research Question

As previously mentioned there is a considerable gap in international literature with regard to understanding teachers' opinions about 'rationalisation'. With this in mind I designed a study to elicit the views of teachers with regard to rationalisation. The question that the study seeks to examine is :

How do teachers perceive the 'rationalisation' of the work force resulting from the revised teacher : learner ratio of 40 : 1 for primary schools and 35 : 1 for secondary schools and the consequential changes taking place in the education system?

In seeking to survey and examine the responses of teachers towards the rationalisation process in the Western Cape it intends to probe the resulting effect that these perceptions might have on the process of implementing rationalisation

Answers to the questions which arise should help educationists develop strategies for maximizing staff cooperation during a period of 'rationalisation' and minimizing the negative side-effects of the implementation process.

CHAPTER 2

THE LITERATURE REVIEW

1. Prevailing Paradigms

Surprisingly, while retrenchments of teachers have taken place in several parts of the world, the phenomenon has not commanded much attention. Unlike other issues around employment, such as the hiring of special-needs teachers, the laying off of teachers has been particularly under-researched and literature with regard to the rationalisation of teachers per se is sparse.

In the immediate pre- and post Second World War period very little was written regarding reduction of the work force in the private or public sector. Some discussion around restructuring and reduction of education workers took place in Germany during the political ascendancy of Nazism and in communist China at the onset of the Cultural Revolution.

It is only from approximately 1970 onwards, that public discussion and scholarly review of literature on reduction in the work force - focusing on the 'laying off' of varying numbers of private sector workers, teachers and other public servants as a 'down-sizing' exercise to promote financial 'efficiency', begins to emerge.

Indeed, with so few precedents, the impact of such a comprehensive re-alignment in the teacher component of the education sector exposes a critical need for scholarly inquiry and analysis.

Distinctive Features Informing the Literature

Recent literature is dominated by private and public sector 'lay-offs' or 'cut-back' management as a result of financial exigency. This differs somewhat from the South African situation where the need to rationalise has been driven mainly by the political demands of **equalisation** and 'equity' and governed by financial circumstance.

It should be mentioned that, with the exception of South Africa, the term **RATIONALISATION**, with regard to restructuring of the public or education sector workers, is hardly ever used in international

literature. Ample reference is made to terms like 'layoffs', 'downsizing', 'retrenchment', 'cutback management', and 'reductions in force' (RIF) when discussing restructuring. In this sense the South African situation is unique in that the term 'rationalisation' refers to both a 'decrease' and 'increase' in the workforce. The implicit connotation of 'rationalisation' as referring to a levelling off or equalising of a previously 'unequal' situation, indicates notions of affirmative and 'defirmative' action. In terms of 'Apartheid' and the unique transformation process in South Africa it will be appreciated that this 'rationalisation process' will find very limited reference in international literature.

It will also be appreciated that reduction in the work force is a particularly sensitive issue in 'Third World' countries with their 'underdeveloped', labour intensive economies which are acutely vulnerable to changing political circumstances.

Their critical dependence on international sponsorship and loans from the IMF and the World Bank make them particularly responsive to 'global policy trends' calling for cut-backs in the public sector wage bill and the numbers of people employed by the state. In this regard they are easily influenced by suggestions from donor institutions calling for 'structural adjustment programmes' which invariably include reductions in the work force.

In view of these factors, the ensuing literature study will investigate, in an exploratory nature, the underlying theories that inform issues surrounding rationalisation and more particularly, its 'downsizing' features and how teachers have responded to these issues.

2. How the problem is conceptualised

Reduction in the work force is the most drastic event in the life of any organisation since it has far reaching and complex repercussions both for the organisation as a 'living' entity and for the individuals who make it work.

In the literature the problem is dealt with from two main perspectives viz. political and economic. With regard to the political motives for restructuring, marxist and socialist ideologies are the main protagonists while capitalist ideology dominates economic motives for restructuring.

Politico-ideological motives for restructuring centre around the idea that the education sector is an agent that should be used to influence and inculcate into the masses a particular brand of social, political and economic ideology. As a consequence employment and dis-employment are often seen as mechanisms to control political patronage [Hayhoe, 1992 : 35].

Economic-efficiency motives for restructuring centre around apparent cost-savings and, with regard to the public sector, as a measure to reduce the expenditure of tax monies [Greenhalgh & McKersie, 1980 : 575]. In this respect reduction in the work force in especially the public sector brings with it negative political fall-out and lower job security which often " ... requires a trade-off in higher pay, according to the theory of economics which associates risk with higher rates of return ..." [Greenhalgh & McKersie, 1980 :580].

2.1. Politico-ideological Discourses

"In a society where stratification is based primarily on income and function, ... the educational system is a particularly powerful force for promoting either socioeconomic equality or inequality" [Meisner, 1977 : 283].

In communist China, where Mao's "Great Leap Forward" had been designed to eradicate the inequities of the past era, the whole-sale borrowing of elements of the Russian education system had in fact re-accentuated the "... advantage of the more privileged social groups and the ... urban over rural youth ..." [ibid, 284]. Financial problems forced poorer schools to close and limited educational opportunities.

The 'Socialist Education Movement' which pre-empted the Cultural Revolution was initiated by Mao in 1962 and sought to reverse 'negative trends' which had developed in education. By 1964 a radical restructuring of the education system took place which included the reduction of full-time teachers and administrative staff [ibid, 348]. Peoples Liberation Army personnel were substituted for civilian cadres and professionals were sent to the army for training and learning [ibid, 295].

This policy of redeployment to 'right-size' perceived 'inequities' in the system is underscored by marxist theories emphasising the eradication of class difference. The engendering of a 'collective welfare'

philosophy and the re-education of education workers was seen as essential for 'ideological purification'[Hayhoe, 1992 : 88].

Political ideology also played a major role in the restructuring of the education system in Germany during the 'Nazification' and the 'glory' years of the Third Reich.

During this period teachers who "... failed to see the new light (of nazism) were cast out ..." [Shirer, 1960 : 241]. As in the case with communist China many were sent for re-education to special schools for "... intensive training in National Socialist principles ..." [ibid]. Through the Civil Service Act of 1933, Jewish teachers were in effect sacked from the system and forbidden to teach at all [ibid].

In comparison to China there are similar politico-ideological motives for re-alignment of teacher numbers with the difference in Germany being an element of racism which resulted in the dismissal of predominantly Jewish teachers from the system. It is notable that Kneller, writing at the height of Nazi power, sees this treatment meted out to Jewish teachers as the result of the struggle of National Socialism against Judaism [Kneller, 1967 : 188].

With regard to education in both Communist China and Nazi Germany, literature sources covering the historical periods mentioned make scant reference to the redeployment or retrenchment of teachers. The subject is largely dealt with as a side issue to what is seen as a 'politically legitimate priority' highly indifferent to the input and opinions of teachers affected by it and imposed on them through arbitrary means.

In analysing the imposition of politico-ideological policy on the work force these discourses reveal aspects of class conflict prevalent in the theories of Marx and Engels. They examine the 'right-sizing' of "Man ... alienated ... from ... his work activity ..." [Blackledge and Hunt, 1985 :125] and expose a political need to reverse the 'relations of production' [ibid, 124]. This reversal is essential since, in the opinion of Bowles and Gintis, "... education ... is tied to society's basic economic and social institutions ..." [ibid, 134]. Thus right-sizing of workers in the education sector is seen as essential for the re-orientation and re-education of the work force.

What is absent from the above theories is the rights of teachers themselves to decide and participate in determining their conditions of service. Notwithstanding Bowles and Gintis' assertion that "... there must be a submission to the requirements of social life" and that "... repression of the individual is a preparation for life in the community ..." [ibid, 144], the need for arbitrary authority could very well be counter productive to social transformation.

2.2. Economic-efficiency Discourses

Politico-ideological exigency largely determined the framework for restructuring and retrenchment of the teacher component in Mao's China and Hitler's Germany.

Within the capitalist system the dominance of fiscal pressure and the concomitant need for efficiency, determined motives for 'layoffs' and reductions in the public sector workforce in America and Canada. In this respect it is important to consider Margaret Archer's view that "...education has the characteristics that it does because of the goals of those who control it ... change occurs because new goals are pursued by those who have the power to modify it ..." [Blackledge & Hunt, 1985 : 327].

The subject of public sector retrenchment gained prominence as a result of the highly publicised fiscal crises that faced the city of New York in the 1970's. This was followed by a cycle of 'cut-back management' which spiralled into other states and became the subject for academic investigation. The present scenario, however, is that "Despite the proliferation of organisational cutbacks, ... relatively little is yet known about their dynamics and administration [Greenhalgh, 1980 : 575].

With regard to 'downsizing' there are various methods that can be applied viz. natural attrition, incentive-induced attrition, system-change, targeting of specific areas and a composite approach. Inherent in all of the fore-mentioned is the utilisation of differing criteria to decide 'who goes and who stays'. The difference in the degree of success, though, lies in policy makers' and managerial approaches and the strategies employed to lessen the impact on the macro system and the employees affected.

In her broad support of this philosophy, Ethel Auster emphasises the importance of 'Humane management' and 'common decency' when reducing the jobs that people hold since the "... ways in which decisions are made ... are ... almost as important as what is being decided"

[1987 : 418]. She advocates devising a decision-making process which is more responsive to 'effective communication' - whereby the co-operation and participation of all stake-holders will be gained through meaningful counselling [ibid, 415].

It is largely agreed that the above theoretical principles are 'fairly basic' to the success of any policy-making process. However, Auster provides evidence of how 'shortcomings' in and the ineffective handling of the decision-making and communication processes are highlighted by comparing the 'Results intended by managers' and the 'Results experienced by staff' [ibid, 416]. Applying these factors to the rationalisation process currently underway in South Africa could prove illuminating.

In presenting the results of three case studies involving Successful Downsizing Strategies, Marta Khan, a director of human resources and affirmative action, emphasises a well "... planned and reasoned ..." approach which is communicated "... clearly and honestly, and carried out with staff involvement ..." [Khan, 1987 : 399]. Her motivation for this humane approach centres on its value for minimizing the "... harmful effects, such as layoffs and costly morale and productivity losses ..." [ibid, 399].

A distinguishing feature of the study that she provides is the significance accorded to detailed, long-term planning with a lengthy period of execution so as to "... help maintain an atmosphere of calm ..." [ibid, 395].

Greenhalgh and McKersie, in their application of neo-liberal economic principles to the issue of the Cost-Effectiveness of Alternative Strategies for Cut-back Management, take a highly **technicist** approach to the problem of layoffs and reduction in the workforce.

In this mode they see 'Reduction' as the outcome of a Cost-Benefit Balance Sheet [1980 : 575]. Justification for this policy strategy is based on the assumption that the "... logic of decision making at state level is largely couched in the language of economics ..." [ibid, 576]. They argue against the use of layoffs as a primary mechanism for reduction in order to minimise loss of confidence and avoid the costs of insecurity [ibid, 581]. In this regard their analysis of the "... financial and organisational gains that would accrue to government ..." [ibid, 579] is infused with quantifying costs such as Income tax loss; Lost productivity; Holding costs; Administration and Losses due to increased Alcohol abuse [ibid, 576].

In citing the incremental effects surrounding reductions in the work force this in-depth study also highlights negative aspects accruing to ill-advised policy options. Amongst the most crucial, especially if one considers the South African experience, are: the damage that lower job security inflicts on the image of the employer; the loss of large numbers of 'better workers' to other sectors; the strong possibility that job insecurity engenders resistance to change; the tendency that organisational decline will foster grievances; the social costs of state policies which traumatize the work force - such as medical problems and anti-corruption strategies [ibid, 581].

It is notable that Greenhalgh and McKersie find it impractical to place a quantifiable value to the crucial aspects mentioned above and admit to the difficulty of measuring the "... fairly intangible ..." [ibid, 579].

This apparent 'difficulty' mentioned above, is alluded to by anti neo-liberal lobbyists like Keith Hinchliffe [1993 : 183 - 187] who criticize the 'narrowness' of aggressive attempts to quantify education 'inputs and outcomes' and the excessive use of market related 'answers' to issues of educational provision -especially with regard to developing nations.

In this respect, the fiscal belt-tightening exercises of the 1970's gave rise to a 'controlling costs' culture - epitomised by Thatcherism. To this end education was short-changed by an over-emphasis on meritocracy and "... high energy free enterprise ..." resulting in a "... lack of respect for most non profitmaking activities ..." like education [Time Magazine, March 15 1993 : 21-23].

The advent of these 'market related answers' was also largely due to the influence of World Bank policies whose **1995 Education Sector Review** placed great emphasis on "... measuring the outcomes of education expenditures ..." [Bennell, 1995 : 1]. The result of these 'measures' introduced a readiness to 'downsize' non-profitmaking organisations like the education sector. This contributed to a disruption and destabilizing of teaching and learning in especially the developing nations and dealt a heavy blow to its transformative role.

Lynn Tylczak, in Downsizing Without Disaster, [1991 : 8] offers approaches to Reduction In Force that are conducive to **labour stability** and minimal disruption of the work force. She probes the inherent

dangers of 'downsizing', profiles the advantages and disadvantages and presents a step by step process to help organisations develop implementation action plans. Her accent on 'planning and attitude' to a 'planned workforce reduction' takes a non-judgemental approach to reduction preferring to highlight the possibility of positive corporate re-alignment' while suggesting the 'best' options for 'damage control' with regard to divisive factors like 'terminations', 'layoffs' and 'cut-backs' [ibid, 16].

William Phelan [1983 : 37] recognises the same dangers of indiscriminate laying off and the unplanned cutting back of teachers as a result of budget cuts. His appeal to "... develop orderly mechanisms of contraction ..." [ibid] forms part of research into examining the most suitable criteria for reducing teacher numbers.

Collins and Nelson in addition to describing the elements of a sound RIF plan analyze the legal implications of RIF in relation to the USA's teacher tenure law which seeks to "... (maintain) an adequate and competent teaching staff, free from political or arbitrary interference ..." [ibid, 250 - 251]. In addition they advocate the development of RIF plans which are "... politically sensitive, and responsive to the emotion-laden issues ..." [ibid, 263]. They caution against plans which "... polarize and demoralize school administration and staff, create insecurity in the minds of parents and students about quality ... and often entail substantial incidental costs ... such as increased use of accumulated sick leave and ... expanded need for substitute teacher coverage ..." [ibid].

3. What Emerges

Central to the economic-efficiency motives is the 'legal validity' of financial exigency as grounds for reduction in the working force. Literature in this paradigm adds no 'new' knowledge' to its basic premises but is essentially a response to prevailing legislation.

What a study of the literature reveals is an inquiry devoid of the social dynamics at play. It largely reveals a functionalist approach to the 'institution of education' preferring to see it as a 'problem-solving mechanism' for re-aligning the foundations of the social order and the roles that members have to play in it [Blackledge and Hunt, 1985 : 64]. This fits in with Earl Hopper's notion of 'ideological legitimation' where "... explanation(s) is couched in terms of elite self interest ..." [ibid, 81]. As such it obscures the pertinent responses that workers have in challenging the system as it affects them. In this way the

literature seeks to deflect the conflict inherent in the restructuring of the education sector by attempting to 'make sense of it' - to socially construct a reality where the 'retrenchment' of teachers is seen as a 'normal' outcome of the development of society [ibid, 91-95].

With reference to the above, scholarly discussion around the predominantly 'top down' nature of RIF is rather subdued, largely because it obscures the practice of arbitrary authority in 'reductions' by presenting an 'apparently greater' organisational need for fiscal discipline. Yet it candidly recognises a growing awareness of the need to communicate with and counsel those affected so as to limit the critical side-effects. In this respect the paper delivered by Soudien, at the Annual Conference of the Comparative and International Education Society in Mexico, stands out since it presents an indepth investigation into the "... Human and Social Resource capacity ..." [1997 : 7] of teachers to cope with the 'real' problems of rationalisation. One comment by a teacher that "... In spite of rationalisation we still had to plan ..." [ibid, 11] succinctly reveals the 'hardship' facing institutions of learning and highlights the "... need to address the issue of reform ...(with)... approaches which take the contexts of schools into consideration" [ibid, 18].

With regard to the current South African education situation covered in the first chapter, the substance of the literature reviewed, indicates only a partial concordance concerning 'Rationalisation'. These include aspects of the politico-ideological motives for restructuring the workforce with a view to the creation of an improved dispensation based on equality and 'equity'. In addition, the literature dealing with economic-efficiency motives, as it relates to the South African situation, finds reference in the use of a standard teacher learner ratio to effect equality and 'equity' within the financial constraints of the budget.

Elementary as the above explanation might seem it bears limited resemblance to the unique combination of historical, political, ideological, social and economic factors imposing on and governing the restructuring of education in the 'new' democratic South Africa.

As previously mentioned **Rationalisation**, as a concept in education restructuring, has never been used internationally. Indeed, the literature insufficiently conceptualizes restructuring and alludes only to a

decrease in workforce. Rationalisation, in the context of the South African situation, includes aspects of both an increase and decrease in teacher provisioning.

Thus, as a source of reference, the term rationalisation is limited to the South African education environment and thus serves, perhaps, as an incentive for scholarly review, investigation and research.

CHAPTER 3

THE RESEARCH METHODOLOGY

1. Research Design

The reason for undertaking this research is rooted in an intense interest in exploring and analysing why and how people working in particular environments come to hold certain views about the reality of the work situation in which they find themselves. With regard to this view, Hughes [1980 : 99] explains that people / workers "... rely on their own meaning frameworks in order to assemble the particularities before them and so achieve a description of this social event and classify it" Within Hughes' framework I would be categorised as a "humanist" researcher. In terms of this, my research task is to examine the "... socially relevant and consequential dispositions ..." [ibid, 76] which teachers find themselves in, extract the "... pattern of these contingent relationships and formulate them ..." [ibid, 77].

The complexities surrounding social research methods and data collection - especially in limiting the influence of bias, both by the researcher and the respondents, make choosing the 'correct' methodological instrument and using it to explain and interpret phenomenon an important decision for making relevant judgements.

In respect of social science theory, Functionalism, as a form of explanation, is one of the most widely used approaches in social research [Bailey, 1987 : 454]. Its relevance, in terms of Bailey's views, stems from its suitability for explaining the existence of a particular phenomenon, identifying and interpreting it as part of a larger system and ascertaining its function in that system [Ibid]. In terms of this the questionnaire as a data collection tool, notwithstanding its apparent limitations with regard to 'a biased sample' or 'observation of non-verbal behaviour', is able to achieve this purpose [Ibid, 149-150].

Functionalism, however, has its limitations. The most notable of these, as Hughes [1980 : 62] says, is that it is 'ahistorical' [ibid, 456], and seems to "... ignore the fact of conflict in social life ..." [Hughes, 1980 : 62]. In this regard, while the use of questionnaires seems convenient if one considers constraints such as time, distance and accessibility to the data sources, clarification and explanation need to be extracted through 'pointed' questions. The aim is to critically identify a 'scenario' shaped by historical,

social, political, cultural, economic, ethnic and gender factors and crystallize it into a "virtual" reality [Denzin & Lincoln, 1994 : 110].

With regard to the interpretive approach, Cohen and Manion [1980 : 26 - 29], emphasise its conscious partiality and the involvement of the researcher in the phenomenon which he / she is investigating. It endorses an "... inner view of social reality ... with first hand knowledge of the way the group conceives the world and the meanings its members impute to such conceptions ..." [ibid]. Thus it is able to negotiate and reconstruct meanings from the data with the respondent and present it as a 'real' phenomenon existing within the dynamic of the social milieu [ibid].

In terms of the WCED's on-going process of restructuring, J. W. Best's explanation of Descriptive Research, as quoted in Cohen and Manion [ibid : 48], is very apt since it underscores a concern with "... conditions or relationships that exist; practices that prevail ... attitudes that are held; processes that are going on ... or trends that are developing ..." [ibid]. Furthermore, the assumption that "... what exists is related to some preceding event that has influenced ... a present condition ..." [ibid] has particular relevance for research into rationalisation of the education sector workforce and the views that are being expressed.

The pursuit of an interpretivist research methodology does not deny the obvious concerns for issues of objectivity, for the researcher, in dealing with the question of restructuring while being a part of it. The goal of "... understanding the complex world of lived experience from the point of view of those who live in it ..." [Denzin & Lincoln, 1994 : 118] is an abiding concern for "... understanding meaning ... for Verstehen" [ibid] of a unique situation in the history of South Africa's educational development. In a sense this indicates the unlocking of a dialogue between researcher and researched "... to uncover and excavate those forms of historical and subjugated knowledges that point to experiences of suffering, conflict, and collective struggle; ... to link the notion of historical understanding to elements of critique and hope" [Giroux, as quoted in Denzin & Lincoln, 1994 : 108]. In a postmodernist paradigm one could label this as a Critical Transformative Inquiry.

This research is based on an approach which draws on the insights from all three of the traditions discussed above. It is conscious of the limitations of each. The study, therefore, uses, methodologically,

the questionnaire - which is regarded as the foremost tool of Functionalism - as its base. In this research I want to use the questionnaire to decode the subjective behaviour / responses of human beings (in the field of education) and locate them, theoretically, in an economic, political, social and historical context. In decoding the responses of the subjects, the study, however, is informed by the interpretivist insight - that the subjects construct their realities not just as the functional or dysfunctional parts of a larger system but as individuals with specific understandings of the world.

The Questionnaire

The instrument used to gather the data was the questionnaire (Appendix B, p 71) since it afforded me the opportunity to look "... with intense accuracy at the phenomenon of the moment and then describe precisely ..." [Leedy, 1993 : 185] the views and responses of educators working within the rationalisation environment. Using the questionnaire would, with quantitative comparisons, provide me with the validity and reliability needed to make rational judgements about the responses. A decisive element in the choice of the questionnaire was that it would provide me with the opportunity, using pointed questions, to ensure 'relevance' - to the individual respondent and to the goals of the study [Bailey, 1987 : 107].

As opposed to the use of interviews, which requires stringent techniques to avoid interviewer bias, the questionnaire will ensure a greater assurance of anonymity and standardised wording [Ibid, 148]. Above all, the accumulated data will provide a concrete basis for interpretation and explanation and for providing reasons for the interrelationships between factors. In so doing it could provide a clearer understanding of 'reality' [Bless & Higson-Smith, 1995 : 10].

In this research study the questionnaire was designed and structured to include biographical details, professional details, knowledge about the relevant literature and issues pertaining to and factors affecting rationalisation. Apart from this, pertinent questions were included to inquire into aspects of equity and redress and the transformation process in education. Part five of the questionnaire made provision for personal comments with regard to the survey and its contents or subject matter.

The necessary permission was applied for and granted by the Western Cape Education Department for the questionnaire to be used in the schools approached. This permission is attached as (Appendix A, pp 68-69).

Three major unions, South African Democratic Teachers Union (SADTU), Cape Teachers Professional Association (CTPA) and South African Teachers Association (SATA), were contacted for approval to approach their members for participation. To date only SATA, whose members comprise of predominantly 'white' teachers, has responded. In this respect the apparent disinterest of SADTU, who as an affiliate of the Congress of South African Trade Unions (COSATU), forms part of the tripartite alliance governing this country, is noted. Similarly no response was forthcoming from CTPA the majority of whose members are from the so-called 'coloured' group which includes the vast majority of the teachers in the Western Cape - the area in which the survey was conducted.

Data Sources

The Western Cape Education Department represents the 'unified' provincial education authority formed after the democratic elections of 1994. Five schools each in the **former** House of Representatives (HOR) previously responsible for the education of so-called 'coloured' people, the Department of Education and Training (DET) previously responsible for the education of 'black' people and the Cape Education Department (CED) previously responsible for the education of 'white' people were approached to take part in the survey. In each of the fore-mentioned groupings three of the five were Primary Schools and two were High Schools. The reason for this was to reflect the imbalance in the occurrence of High and Primary schools. Care was taken to select schools from different suburbs in the urban area of the Western Cape so as to canvass views from the differing social milieus which respondents find themselves in. Of all the fifteen schools listed below, the two High Schools in the DET did not respond, while one Primary School in the CED group did not respond.

HOR SCHOOLS

DET SCHOOLS

CED SCHOOLS

High Schools: Rocklands

I. D. Mkize

Pinelands

Livingstone

Harry Gwala

Rhodes

Primary Schools : Harvester Intshinga De Kuilen
 Surrey Vuyani Parow Prep.
 Klipfontein Lehlohonolo Rondebosch

For the interest of the reader, the decision to 'select' five schools from each of the previous education authorities was done so as to obtain the views of different groupings of teachers who had experienced the educational system in vastly differing ways - as dictated by the previous governments' unequal treatment of educators and learners according to their 'racial' classification. In terms of this, while the schools in the previous CED were privileged, the DET 'Black' teachers and learners were most disadvantaged, while the HOR teachers and learners were less disadvantaged.

In addition to the above schools canvassed I also conducted a pilot project at Lantana Primary (where I am the school manager) to ascertain whether any difficulties were experienced with the completion of the questionnaire.

Interpretation of the Data

The interpretation of non-verbal data challenges the approach of a dialogue between researcher and researched alluded to earlier. In this respect the experiences of rationalisation that educators undergo within the educational milieu, generates internal meanings for each and every educator. The similarities and differences in their responses 'speak back' at questions put to them and can be congealed into 'theories of virtual reality'. In this respect the 'meaningful' interpretation of unspoken responses can best be served by evaluating and analysing 'patterned evidence' and linking its relevance to social theory [Denizen & Lincoln, 1994 :398-399].

In terms of the above I will be interpreting the data in clusters as indicated by the sections into which the questions have been arranged. The key elements guiding this presentation will include :

- * Personal and biographical details and how these can be linked to and interpreted against specific responses
- * The level of literacy of the respondents relating to their understanding of and access to documentation surrounding the rationalisation issues
- * Understanding of the key concepts of Equality and Equity

in respect of the distribution of physical and human resources

- * Perceptions regarding the national teacher : learner ratio and its effects on the education system
- * Education transformation in the Western Cape and factors that might impact on the rationalisation process

It must be said that the wealth of data gleaned from the research could be used to shed light on a wide variety of issues - such as, for example, a gender specific view of the of responses to rationalisation. This, however, was not the immediate aim of my research and I shall therefore be focusing my discussion on responses to the issue of rationalisation in the WCED.

The study therefore, has specific limitations. It seeks to draw out and examine the particular responses of educators to the on-going process of rationalisation, to identify possible factors like the level of disadvantage suffered under the previous regime, to discuss perceptions regarding the national teacher / learner ratios and to obtain an understanding of the key concepts of equality and equity, that have impacted on these responses.

CHAPTER 4

FINDINGS

In this chapter, consisting of five parts, the responses to each question are firstly presented as a percentage. These percentages are quantitatively examined and interpreted, on a first level, in respect of the question being asked. Where it is relevant, the responses are cross referenced on an inter- and intra level, with responses to other parts and questions in the research study and particular inferences and analogies are drawn. In the next chapter these will be examined within their theoretical contexts. The implications for policy making with regard to rationalisation of the workforce will also be discussed.

Presentation

As the questionnaire was divided into five parts, the statistical presentation of the results will follow the same pattern. From all the schools canvassed, one hundred and thirty (130) questionnaires were returned. By grouping, the total returns per type of school were as follows :

	<u>HOR</u>	<u>DET</u>	<u>CED</u>	
High Schools	15	0	20	= (35)
Primary Schools	42	36	17	= (95)
	<hr/>			
TOTAL	57	36	37	= (130)

The results of the processing of the 130 questionnaires, presented as percentages, are described below. This description is limited to an outline of the major global features evident in the data. The following chapter attempts to synthesize and analyze the connections within this data.

Part One

This section dealt with biographical and professional details of teachers.

Gender:

Of the total number of respondents, 61,5% were females while 38,5% were males.

Marital Status

Results show that 61,5% of the respondents were married while 37,7% were not married or single (0,7% did not respond to this question). Of the married respondents 68,8% were women while 31,2% were men. A large section (42,3%) of the **total number** of respondents were thus married women.

Age Group in Years

Results show that 17,7% of the respondents were in the age group 20 to 29 years, 42,3% were 30 to 39 years of age, 24,6% were 40 to 49 years of age while 15,4% were older than 50 years of age. Further analysis shows that 57,7% of the respondents younger than 40 years old are women.

In terms of Holly and Mcloughlin's classification [1989 : 120], this would place more than 50% in the "developmental age" of the undermentioned theorists :

Levinson : "settling down" , "transitional period"

Gould : "becoming adult"

Sheehy : "provisional adulthood"

Teaching Experience in Years

18,5% of the teachers had one to five years experience, 21,5% had 6 to 10 years, 12,3% had 11 to 15 years, 22,3% had 16 to 20 years, 12,3% had 21 to 25 years, 7,7% had 26 to 30 years while 5,4% had more than 30 years of experience.

If this is correlated with the "teacher career cycles" described by Peter Burke and others [Holly & Mcloughlin, 1989 : 124], then 52,3% of the respondents could be placed in the "first career phase" (less than 15 years experience), which is characterised as "... finding one's place in the profession ..." [ibid]. Concomitant to this 47,7% of the respondents could be regarded as being "rooted" in the profession [ibid].

Previous Education Department

Concerning the previous education authority in which teachers found themselves, 43,8% were from the HOR, 28,5% from the DET and 27,7% from the CED.

Education Sector

Of the total number of respondents, 69,2% were from the primary school sector and 30% from the secondary/high school community (0,7% did not respond to this question).

A gender specific analysis shows that 68,8% of primary school respondents were women while a high school analysis shows that 55% of the respondents were men. Although this indicates a more equitable gender balance in the high schools, the primary sector staffing has, historically, always had a gender imbalance in favour of females.

Professional Status

With regard to the professional status of the respondents, 77,7% were post level one teachers, 16,9% were heads of departments, 1,5% were deputies while 3,8% were principals.

Further analysis shows that 87,5% of the post level one teachers were females. Considering this statistic it would not be unreasonable to suggest that the majority of those who are at risk as a result of rationalisation might be women. This figure is significant in many respects, not least of all because it reflects the relationship between power and vulnerability embedded in the gender structure of the school.

Highest Academic Qualifications

Not suprisingly, given South Africa's education history, the highest academic qualifications held by most teachers was a matriculation certificate. 55,4% of the sample indicated that their highest qualification was a matriculation certificate, while 16,2% had Bachelors degrees and 22,3% had attained a post-graduate degree (6,1% did not respond to this question).

Substantiating the professional status distribution indicated above, 75% were females, most of whom (55,5%) indicated that they did not consider themselves skilled for another job besides teaching.

Employment Status

In respect of the employment status of respondents, 2,3% were on probation, 6,9% were temporary educators in vacant posts, 2,3% were substituting for a permanent educators, 85,4% were permanent educators while 3,0% did not respond to this question.

Further examination reveals that if these statistics are analyzed according to the previous groupings of the respondents, then 10,8% from the DET and 14% from the HOR are either temporary substitute educators. If one considers that none of the ex CED respondents were either temporary or substitute educators it requires little further extrapolation to make the point that there is reason for anxiety in the ex DET and especially HOR groups with regard to rationalisation of the workforce.

Part Two

This section dealt with three key areas viz. the reading of important documents relating to Rationalisation, the concepts Equality and Equity and views with regard to the revised Teacher / pupil ratio.

Respondents were asked to say whether they had read certain documents pertaining to rationalisation and indicate their level of understanding of them. In this section respondents were asked to classify certain concepts in terms of Equality and Equity. In the last section respondents were asked to indicate the extent to which they agreed or disagreed with the National teacher : learner ratio's and its effects on the education system.

As the reading of the White Paper on Education is crucial to understanding the key elements of educational change and the way that the Rationalisation fits into its larger scheme the results of its processing will be presented separately. The responses to the reading of Circulars and other documents pertinently related to the Rationalisation process will be presented as an aggregation.

Responses with regard to the White Paper on Education (1995) indicated that 47,7% had read the document. Of these 12,3% indicated that they fully understood it, 29,2% had only partially understood it while 6,2% did not understand it.

Those who did not read the document represented 47,7% of the total sample. Of these 26,1% indicated that it was not available, 10,8% were not interested in it and 10,8% indicated that they did not have the time to read it. Those who did not respond to this question represented 4,6% .

The fact that only 12,3% of respondents (16 out of 130) read and fully understood the Education White Paper (1995) is significant and may be construed as a contributor to alternative perceptions with regard to its *raison d'être* - especially with regard to the process of rationalisation.

Questions 11 to 16 dealt with the reading of the following documents which are pertinently related to an understanding of the Rationalisation process : Circular 94/95 which dealt with the Advertising of Vacant Posts; Circular 51/96 which dealt with the Voluntary Severance Package; Circular 68/96 which dealt with Severance and Redeployment; Circular 92/96 which dealt with Amendments to the Redeployment and Voluntary Severance Package; Education Labour Relations Council Resolution 3 of 1996 which dealt with Right-sizing of teachers and its Procedure Manual.

An aggregation of the responses for the above documents, including the Education White Paper, indicated that 59,3% had read the documents. Of these 24,9% indicated that they fully understood them, 25,6% only partially understood them, while 8,8% did not understand them. Those who did not read the documents represented 35,4% . Of these 18,9% indicated that the documents were not available, 9,5% were not interested in reading them and 7,0% had no time to read them. An aggregation of those who did not respond to this question represented 5,3% .

The repetition of this "negative" tendency - where only a small number read and fully understood pertinent documentation - places a serious question mark over the quality of information in the sector.

Equality vs Equity

The section which followed dealt with the definitions of Equality and Equity.

With regard to the definitions of **Equality** and **Equity** as specified in the questionnaire (see pp 61-77), matching of the concepts with the definitions indicated that 20,8% classified **Affirmative Action** with equality while 59,2% classified it with equity.

On closer analysis of responses, according to ex Department grouping, the HOR (64,9%) and CED (61,1%) respondents clearly equated **Affirmative Action** with **Equity**. In respect of the ex DET, 48,6% (somewhat fewer) equated it with **Equity** while 29,7% described it as **Equality**. This could represent a certain level of uncertainty with the classification of Equity and Equality which, as will be shown later in the analysis, tends to be repeated.

This section dealt with the allocation of human and physical resources and resourcing (including finances) by the Western Cape Education Department and respondents were required to match given concepts with either **Equity** or **Equality**.

Matching of the concept **Even Distribution** indicated that 27,7% matched it with equity while 54,6% matched it with equality.

With regard to **Parallel Provisioning** 31,5% matched it with equality while 33,1% classified it with equity. Matching of the concept **Identical Resourcing** indicated that 35,4% matched it with equity while 40,7% matched it with equality. Matching of the concept **Uniform Standards** indicated that 37,7% matched it with equity while 46,9% matched it with equality. With regard to **Equivalent Allocations** 36,9% classified it as equity while 43,1% classified it as equality.

With regard to the preceding group of statistics it is interesting to note that while the literal interpretation of the concepts : **Even Distribution, Parallel Provisioning, Identical Resources, Uniform Standards and Equivalent Allocations** allude more to **Equal** or **Equality** in funding, and the provision of physical and human resources, the percentage of returns indicate that an average of 34% of the respondents chose rather to classify these terms as representing **Equity**. This, as previously mentioned, gives weight to the concern that there is an apparent uncertainty about the understanding of these two terms.

In considering the concept **Biased Ratios**, 13,8% placed it as a form of **Equality** while 45,4% placed it with **Equity**. If the statistics are considered according to ex Departments then **Biased Ratios** would be classified by the different groups as follows :

BIASED RATIOS :

	<u>Equality</u>	<u>Equity</u>	<u>Undecided</u>	<u>Did not Respond</u>
ex DET	21,6%	29,7%	40,5%	8,2%
ex CED	11,1%	58,3%	22,2%	8,4%
ex HOR	10,5%	47,3%	38,5%	3,7%

Clearly the inter variation between the percentages is noticeable and alludes once more to the presence of uncertainty. Of interest too is the fact that this question delivered the highest return of "undecided" responses.

In considering **Redress of the Past** 18,5% classified it with **Equality** while 70,8% classified it with **Equity**. This classification presented the most consistent responses from the three ex Departments thus:-

REDRESS OF THE PAST :

	<u>Equality</u>	<u>Equity</u>	<u>Undecided</u>	<u>Did not Respond</u>
ex DET	21,6%	54,0%	13,5%	10,9%
ex CED	19,4%	77,7%	0,0%	2,9%
ex HOR	15,7%	77,1%	3,5%	3,7%

With regard to the concept **Justice** 38,5% classified it with **Equality** while 43,8% matched it with **Equity**. It is interesting to note that while the ex DET and HOR concurred in their classification of this concept the majority of ex CED respondents (61,1%) classified **Justice** with **Equality**.

In respect of the concept **Fairness** 33,1% classified it with **Equity** while 44,6% matched it with **Equality**. Of interest here, is the variance between the ex Departments of how they classified **Fairness**:

FAIRNESS :

	<u>Equality</u>	<u>Equity</u>	<u>Undecided</u>	<u>Did not Respond</u>
ex DET	32,4%	37,8%	18,9%	10,9%
ex CED	61,1%	19,4%	16,6%	2,9%
ex HOR	45,1%	38,5%	15,7%	0,7%

An analysis of the above shows that while the ex CED respondents classify **Fairness** with **Equality** (which correlates exactly with their classification of **Justice**), there is a decided (but concurring) split in the ex DET and HOR with regard to the classification of **Fairness** and **Justice** with **Equality** and **Equity**.

An aggregation of **Undecided** responses indicated that 16,8% were uncertain as to their responses. In this regard the highest 'undecided' response was the classification of **Biased Ratios** (34,6%) while the lowest was with regard to **Redress of the Past** (5,4%). An aggregation of those who did not respond to particular questions was 5,2% .

What the above indicates is that, in terms of the exposition of equity and equality as outlined by Walter Secada, there appears to be uncertainty with regard to the subtle difference between the two concepts. Indeed, a broad analysis of the Education White Paper (1995) will reveal a similar intermingling of the two concepts and is perhaps the reason for the apparent uncertainty amongst respondents - especially the ex DET and HOR groups who would probably be most affected by its implications.

The National Teacher / Learner Ratio

This question concerned the extent to which respondents agreed or disagreed with the National teacher: learner ratios and their effects on the education system. With regard to the revised **National Teacher / Learner Ratios** (NTLR), responses indicated that 32,3% agreed that it would bring about equality while 55,4% disagreed. In considering whether the NTLR would bring about equity 34,6% agreed while 43,8% disagreed.

In considering the concepts of Equity and Equality across the three previous ex departments a more informed finding might be discerned with regard to how the previously disadvantaged groups perceive the addressing of their implementation. A more detailed analysis of the statistics shows that, in assessing Agreement or Disagreement with the two concepts the results are as follows :

EQUALITY : (A= Agree ; D=Disagree)

		DET	CED	HOR
1. The National T / L ratio and its effects on the education system	A	62,1%	27,7%	24,5%
<u>will bring about Equality :</u>	D	35,1%	55,5%	68,4%
2. Implementation of the National initiatives by the WCED -	A	35,1%	36,1%	24,5%
<u>ensures attainment of Equality :</u>	D	51,3%	44,4%	56,1%

Thus, with regard to the concept Equality, comparison with the overall statistics shows that the majority of ex DET educators are in agreement that National initiatives will bring about Equality. But, when we analyze their responses with regard to WCED implementation of National initiatives, a level of disagreement with practical implementation is discernable.

In contrast to this, the majority of ex HOR educators disagree that National initiatives will bring about Equality and they disagree that WCED's practical implementation of National initiatives would ensure Equality.

Juxtaposed against these two groups, responses of the ex CED educators indicate a fair level of disagreement that National initiatives will bring about Equality, while they seem to be split (in favour of WCED) on whether the WCED's practical implementation of National initiatives would ensure Equality.

Cursory analysis of the above would suggest that support for National policy by the majority of ex DET educators is as pronounced as their mistrust of WCED's practical implementation of transformation policies.

In the case of the majority of ex HOR educators, their disagreement with both National and WCED policy initiatives could suggest a fair level of suspicion of both components.

With regard to the majority of ex CED educators, their disagreement on the issue of National teacher / learner ratios correlates with those of the HOR, while fewer disagree that WCED's practical implementation of National initiatives will ensure Equality.

In respect of the above statistics and analysis, there appears to be a fair level of concurrence when compared to the concept of **Equity**. Thus :

EQUITY : (A=Agree ; D=Disagree)

		DET	CED	HOR
1. The National T / L ratio and its effects on the education system	A	54,0%	36,1%	33,3%
<u>will bring about Equity :</u>	D	37,8%	36,1%	52,6%
2. Implementation of the National initiatives by the WCED -	A	40,5%	41,6%	33,3%
<u>ensures attainment of Equity :</u>	D	51,3%	24,3%	45,6%

There is a discernable level of concurrence with regard to how the majority of ex HOR educators feel about Equality and Equity in respect of both National and Provincial policies and their practical implementation. The same can be said of the responses of the majority of ex DET educators to these concepts.

With regard to responses to the concept of Equity by the ex CED educators, it is noticeable that the question (of whether the implementation of National policies by WCED would ensure the attainment of Equity) drew directly opposite responses. This, coupled with an even split on the question of whether National policy (with regard to a National teacher / learner ratio) would bring about Equity, seems to indicate a noticeable level of uncertainty and difference amongst ex CED educators - not only of how they perceive these concepts but also their responses to it.

With regard to whether the NTLR would adequately address Reconstruction and Development 24,6% agreed while 49,2% disagreed. In responding to whether the country could presently afford the NTLR 24,6% agreed while 48,4% disagreed. In considering whether the NTLR addresses the need for affirmative action 29,2% agreed while 49,2% disagreed. With regard to whether the NTLR would improve academic standards 22,3% agreed while 70,7% disagreed. In respect of whether the NTLR would improve teaching standards 16,9% agreed while 73,1% disagreed.

It is clearly noticeable that, with the exception of the questions dealing with Private Schooling and Change, the pattern of the responses indicates concurrence between the majority of ex CED and HOR educators with regard to the NTLR and its possible impact on the system. One of the reasons for the apparent "negativity" of the majority of ex HOR and CED educators could be that the NTLR set by the first post-Apartheid education ministry significantly reduced the advantage of the previous HOR and more decidedly the ex CED educators and learners and improved the position of the ex DET grouping.

In responding to whether the NTLR would encourage private schooling 71,6% agreed while 11,5% disagreed. With regard to whether the NTLR will bring about fundamental change in education 44,7% agreed while 38,4% disagreed.

The overall response with regard to whether the NTLR would encourage private schooling showed, contrary to the pattern of responses in this section, broad agreement by all three groups that private schooling would increase. Perhaps this could be construed as indicating consensus across all three groups that the NTLR determined by the ministry was not the optimum one to foster an improvement in the quality of education.

In considering whether the NTLR was the most effective means to achieving rationalisation 25,2% agreed while 47,0% disagreed. Of interest is the fact that 73,7% of those who disagreed belong to a union or organised labour.

An aggregation of **Undecided** responses indicated that 15,8% were uncertain as to their responses. In this regard the highest 'undecided' response dealt with the NTLR as an effective means to achieve

rationalisation (25,4%) while the lowest was the response dealing with the NTLR influence on improvement of academic standards (5,4%).

Part Three

This section dealt with views comparing the practical implementation of the transformation process in the Western Cape with National transformation initiatives. In respect of this section it was noticeable that it presented the largest overall percentage of "undecided" responses (26,1%).

Upon further investigation a pattern is evident in that 17,5% of ex DET educators, 27,8% of ex HOR educators and 33,0% of ex CED educators are undecided with regard to the evaluation of the practical implementation of National Transformation policies by WCED. Thus, even with regard to indecision and uncertainty, there emerges a pattern of responses which correlates directly with the level of advantage / disadvantage under the education ministries of the apartheid regime.

With regard to whether the transformation process in the Western Cape was in line with National initiatives, 41,5% agreed, 29,8% disagreed and 25,4% were undecided.

As to whether the Western Cape was conforming to the National Reconstruction and Development programme, 40,8% agreed, 26,2% disagreed while 29,2% were undecided.

In respect of whether the Western Cape's implementation of transformation would ensure the attainment of Equality, 27,7% agreed, 51,5% disagreed while 17,7% were undecided.

In respect of whether the Western Cape's implementation of transformation would ensure Equity, 33,8% agreed, 41,6% disagreed while 20,8% were undecided.

As to whether the practical implementation of transformation in the Western Cape is committed to ensuring full community participation, 33,8% agreed, 41,5% disagreed while 20,0% were undecided.

With regard to whether the Western Cape's implementation of National initiatives was entrenching the influence of organised labour, 30,6% agreed, 25,4% disagreed while 40,7% were undecided.

In gauging whether the Western Cape's practical implementation indicated the authority that National initiatives had over Provincial implementation, 50,0% agreed, 20,8% disagreed while 26,1% were undecided. If this result is correlated with the responses relating to conformation with National initiatives (see above) then there appears to be broad agreement that the education policies of the country are being driven by the ruling party - even in the Western Cape which is run by the party who controlled national education policies in the apartheid era.

In respect of whether practical implementation of the transformation process in the Western Cape is providing adequate protection for unrepresented labour, 18,4% agreed, 38,5% disagreed while 36,9% were undecided.

As to whether practical implementation of the transformation process in the Western Cape is moving at too fast a pace, 44,7% agreed, 30,0% disagreed while 20,8% were undecided. Notwithstanding the noticeable level of indecision with these responses, the fact that there was broad agreement on this issue and the ones relating to "Administrative Mismanagement by WCED" and "Unclear directives from National Ministry" would appear to indicate a definitive level of dissatisfaction amongst all the respondents with the whole handling of the rationalisation process.

The Influence and Impact of controlling factors on WCED

Rationalisation policies

With regard to the degree of impact that the undermentioned factors had on the rationalisation policy in the Western Cape Education Department (WCED), a noticeably large percentage of the respondents (average 62,0%) recorded a Powerful or Clear impact while a noticeably small percentage (average 14,6%) recorded a Limited or No impact opinion.

In addition, the results of responses in this section presented an overwhelming degree of concurrence between the three groupings. In only 5,8% of the questions (one out of seventeen questions) was there a discordance. In this question dealing with the "Mismanagement of the process at school level", respondents of the ex CED was the only group who indicated that it had "Little" or "No" impact on the rationalisation policy of the WCED.

An analysis of the number of respondents, who indicated that the undermentioned factors had a **Powerful or Clear impact** on the rationalisation policy of the Western Cape, showed the following :

* Fear of unemployment	80,7%
* Inadequate severance package	54,4%
* Unfair labour practices by WCED	51,5%
* Racism in general	54,6%
* Racial composition of the Western Cape	54,6%
* Ignorance of the issues	51,5%
* Influence of political parties	69,2%
* Influence of provincial elections	63,1%
* Fear of drop in standards of teaching and learning	77,7%
* Administrative mismanagement by WCED	59,3%
* Unclear directives from National Education Ministry	69,2%
* Influence of teacher organisations	60,0%
* Influence of the media	54,6%
* Redeployment issues	76,9%
* Inadequate consultation of all stakeholders	67,7%
* Mismanagement of the process at school level	48,4%
* Practical implications of phasing in T/P ratios	61,6%

An interesting feature of the above statistics was the differing group responses relating to the **Impact that the following factors had on the Rationalisation policy in the WCED :**

A. **Racism in general** (...and)

B. **Racial composition of the Western Cape**

	<u>DET</u>		<u>CED</u>		<u>HOR</u>	
	A	B	A	B	A	B
* Powerful or Clear Impact	75,6%	72,9%	30,5%	36,1%	70,1%	71,9%
* Undecided	8,1%	13,5%	41,6%	47,2%	15,7%	21,0%
* Limited or No Impact	10,8%	13,5%	27,7%	16,6%	14,0%	7,0%

From the above it can be gleaned that while there is a definite concurrence and correlation between the responses of the ex DET and HOR educators with regard to the two questions (A and B), the statistics of the ex CED (with regard to both questions) indicate a high level of indecision and uncertainty. Against the DET and HOR responses it could appear that the ex CED educators deny the influence and impact of these factors. Taking into consideration the highly politicised environment in which education operated in the apartheid as well as post apartheid period, these particular responses are open to interpretation.

For all of the above factors an average of 16,6% respondents were undecided as to the degree to which any one of the factors mentioned above, impacted on the rationalisation policy of the WCED.

Part Four

This section dealt with responses of a more personal nature which could shed light on the possible impact of rationalisation.

Of the total, 73,1% of respondents indicated that they belonged to a professional organisation or union, while 23,1% did not. It is interesting to note that of the ex HOR educators 40,3% did not belong to a union or educator organisation. In this regard there could be a correlation with their responses concerning the "**Inadequate consultation of all stakeholders**". In this instance 78,9% of ex HOR respondents indicated that this factor had a Powerful or Clear impact on the rationalisation policy of the WCED.

In having to indicate two major sources of information regarding agreements taken in the Education Labour Relations Council, the three major news mediators were : Union / organisation meetings 21,5%; the press 27,8% and the school principal 35,1% . In this respect responses show that the unions and educator organisations ranked only third as a disseminator of information and highlights the crucial role that school managers play in the rationalisation process.

With regard to whether the respondent was the only person in the immediate family that was employed, 28,5% indicated that they were, while 67,7% indicated that they were not. Of those who indicated that they were the only person in the immediate family who was employed a significant 62,1% were female. 62,3% of respondents indicated that they were the largest salary earner in their households (49,4% of which were female), while 33,8% indicated that they were not.

As to whether the respondent was awaiting retirement, 14,6% indicated that they were, while 76,9% indicated that they were not.

With regard to whether the respondent was skilled for another job besides teaching, 50,8% indicated that they were, while 45,4% indicated that they were not. The majority of those who indicated that they were not skilled for another job, 72,9% , were women. If correlated with the impact that "**Fear of Unemployment**" had on the rationalisation process in the WCED then these statistics might indicate why 61,9% of those respondents were women.

In respect of whether the respondent would, after consideration, still choose teaching as a career, 60,7% indicated that they would, while 35,4% indicated that they would not.

Asked to indicate how many years respondents would still want to remain in the teaching profession, 33,0% indicated that they would stay for 5 years or less, 21,5% indicated that they would stay for ten years, 4,6% would stay for 20 years and 36,9% indicated that they would stay until retirement age.

When the preceding statistics are correlated with the respondents' teaching experience in years (question 71), then of the 47,7% who can be considered as being 'rooted' in the profession 40,3% would intend staying for 5 or less years -the largest number of them being from the previous HOR group. This,

coupled with the number of "rooted" educators possibly opting for the Voluntary Severance Package, could result in a shedding of a meaningful group of experienced educators.

Part Five

Commentary on the survey and its contents or subject matter elicited a response from only 27,7% of the total number of respondents.

While some reflected on technicalities of the questionnaire, the majority commented on the subject at hand. With regard to these it was noticeable that respondents from the previous DET cited the apparent continuation of former racist policies in the education department and their detrimental effects on the transformation process. Respondents from the previous CED concentrated their comments on the negative effect that the new learner / teacher ratios would have on quality of teaching and learning. Respondents from the previous HOR stressed the negative impact that rationalisation would have on the quality of education and the morale of teachers. They also mentioned that it would accentuate the imbalances inherent in the system and underscore the perception that those parents who had money could buy a better quality of education for their children.

Respondents from all three groups criticised the management and administration of the process of rationalisation and the ineffective and arbitrary flow of information.

CHAPTER FIVE

ANALYSIS OF FINDINGS, CONCLUSIONS AND RECOMMENDATIONS FOR POLICY MAKING

This chapter reflects on the statistical findings presented in chapter four. It seeks to analyse and draw out significant tendencies, appraise and discuss tensions apparent in the data and draw conclusions as to its significance for policy making.

An analysis of the findings may be presented in two dimensions. Firstly, they present a dimension which manifests the aggregated responses of a cross section of educators in the Western Cape Province.

Upon closer examination, a second dimension, informed by the particular historical, political and educational configuration of the Western Cape Province, becomes evident.

The First Dimension

Evident in a cross section reading of the data is the presence of a general sense of negativity with regard to the rationalisation process and its implementation. This trend is characterised by an undercurrent of **uncertainty, suspicion, disapproval, resistance** and a measure of **nescience** and **alienation**.

Evidence of the fore-mentioned trends manifests itself with regard to key issues. One of the main issues is the **flow of information** regarding rationalisation and its implementation process. This involves the unmanaged flow of important information from key management / negotiating structures. Included here, is the flow of unratified information, of a serious nature, from top structures like the Education Labour Relations Council ; the dissemination of unratified information by union negotiators to members at local level ; the passing on of information critical to the stability of the teacher workforce to the media, before it has reached schools.

It also involves, in certain instances, sensitive information reaching schools ahead of middle management levels like area and circuit managers - thus hindering the debriefing phase and thwarting strategic planning.

In addition, results from the data regarding the reading of key documents indicates that **the process of the dissemination of information to teachers**, from top management at school level, is flawed since most teachers had not read crucial documentation regarding rationalisation and its implementation process. If this is linked to the number of teachers who read the documents and circulars dealing with the implementation process and procedures, but indicated that they did not understand them, then the concomitantly high level of dissatisfaction with the rationalisation **PROCESS** will be seen in context.

The setting of a **National teacher / learner ratio** of 40 : 1 for primary and 35 : 1 for high school learners is another key issue which contributed to the general sense of negativity amongst the teacher workforce. It heightened perceptions of an eventual drop in teaching standards due to overcrowding in the classrooms ; signified an impending lack of commitment by teachers - impacting on the culture of teaching, learning and extra curricular activities and concomitantly, a possible increase in the rate of teacher absenteeism due to stress.

Significant returns identifying **Administrative mismanagement by WCED**, as having a powerful and clear impact on the rationalisation policy, point again to an inadequate flow and discordant presentation of information. In this regard the pivotal role of middle management (area, circuit and school managers) with regard to facilitation of the process cannot be underestimated.

The analysis generally reveals concurrence with other provinces in experiencing a perception that private schooling will increase. Concomitant to this the education system in the Western Cape (as well as other provinces) is at present experiencing a steady flow of learners from previously disadvantaged schools to those of the previously "white" schools.

The reasons for this need careful consideration but might be interpreted as an indication of a "loss of faith" in the pace of governments' efforts to redress inferior resourcing of especially ex DET schools during the apartheid regime.

The high level of concurrence amongst WCED teachers that **Redeployment issues** have had a powerful impact on the rationalisation process echoes a "national" issue which is impacting negatively on the pace of progress towards transformation of the system. Unclear directives from the national education ministry

and its apparent inability to effectively manage the redeployment process, has led to friction with the majority of teacher unions who are accusing the ministry of "... renegeing on the letter and spirit of the agreement ..." [The Teacher, February 1997]. It appears that the education ministry's intention to shed teachers from the system by offering them Voluntary Severance Packages (VSP) is being construed by SADTU as being "... only interested in cutting down the number of civil servants and not in redeployment ..." [ibid].

The fact that "**Unclear directives from the National Ministry**" was cited by the vast majority of respondents from all three ex departments as having a powerful impact on rationalisation, lends credence to allegations of mismanagement of a process that would fundamentally change education.

In comparing responses across the three groups, the common issues where there was overwhelming evidence of concurrence included :

	DET	CED	HOR
* The Fear of unemployment	78,3%	77,7%	94,7%
* Influence of party politics	78,3%	80,5%	70,1%
* Drop in standards of teaching / learning	78,3%	75,0%	91,2%
* Inadequate consultation of stakeholders	70,2%	75,0%	78,9%
* Redeployment issues	83,7%	80,5%	82,4%
* The practical process of phasing in teacher : learner ratios	72,9%	64,8%	70,1%

Concurrence in the above issues pinpoints a clear indication, across all groups, of the level of dissatisfaction and disapproval of the process of rationalisation and its effects. There is a distinct impression that, in planning, cognisance was not taken of all the relevant factors that would inform rationalisation. In addition, all the issues that would accrue to the process of changing such a unique educational history were not taken stock of.

The statistics convey a perception that an **in-depth study** - an "Environmental Impact Study" - exposing the effects that such a critical mechanism (rationalisation) would bring about was not done. Indications are that the effects of such arbitrary planning could seriously affect the education sector in the short to

medium term - not only with regard to its transformative intention but it might also have a negative bearing on attracting dedicated students into the profession.

It is clear that the implementation process of rationalisation is seriously flawed and that its execution could impede meaningful transformation. More forthright has been the comment by the general secretary of the largest teacher union, SADTU : "As things stand now, the whole rationalisation process is a farce [The Teacher, February 1997]. While this remark must be seen against a particular context, it indicates the high level of discontent amongst educators and symbolizes that a substantial basis for the resistance to rationalisation was a frustration with *the implementation process itself*, as much as with the necessity of rationalisation per se. As such, it not only encourages the alienation of educators but acts as a serious indictment on the transformative role that education needs to play in the creation of a "new" society.

The Second Dimension

As previously mentioned, analysis of the data at this level revealed results distinctly allied to the levels of advantage / disadvantage experienced during the apartheid era and thus to the affiliation to the three different ex departments (HOR, CED and DET).

Pre rationalisation employment statistics [WCED, 1995] indicated that ex DET teachers comprised 9,5% of the total number while ex CED accounted for 26,3% and ex HOR the majority of 63,7% .

Analytical investigation of this second dimension clearly revealed the distinct influence of the historical dispensation of the apartheid years on the present education situation, more so in the Western Cape Province, since it remains the only province where the National Party, which epitomises previous "white rule" and discrimination, won the post apartheid election. The fact that it did so with the "aid" of the previously disadvantaged so called "coloured" voters (whose education system was run by the ex HOR department) increases the level of uncertainty, mistrust and suspicion and serves as an added element of divisiveness. This is borne out by an ex DET teachers' remark that : "The Western Cape is a Nationalist party haven and is therefore bound to resist change, because people in the Western Cape have indicated, through their votes, that they liked the system of of government"

This is one of the leading factors underpinning the suspicion and resistance generated against the implementation processes driving rationalisation in the province - notwithstanding the fact that education policies are governed by National guidelines.

Support for the above interpretation is found in the high level of concurrence with the following two statements concerning factors which had a powerful and clear impact on the rationalisation process: 'Influence of political parties' and 'Influence of provincial elections'. Correlation with the views on **Racism in general** and the **Racial composition of the Western Cape** supports this opinion. In particular, the ex DET and HOR teachers from the disadvantaged communities expressed very similar results with regard to the above.

However, further examination also reveals that, generally, the level advantage / disadvantage in the past, influenced particular responses. This is evidenced, for example, in the level of concordance by ex CED and HOR teachers in their contention that national government could afford a more advantageous teacher / learner ratio. This would coincide with a possible need to secure and protect previous advantages and could generate dissatisfaction and suspicion if previous advantages were decreased.

The prevalence of these circumstances clearly indicates features which, given the distinct nature of the historical groupings in the Western Cape Province (alluded to elsewhere), should have been a pivotal factor in designing a short to medium term model for rationalisation of the education sector in the province.

Broadly speaking, the analysis generally indicates that the **ex DET teachers generally support national policies and are suspicious of WCED's IMPLEMENTATION of rationalisation**. The fact that ex DET teachers generally support national policies is epitomised by a remark by an ex DET teacher that: "Personally I am not against National Policies on education " and is further illustrated by ex DET teachers' consensus (in opposition to ex CED and HOR teachers) that the effects of the new ratios on the education system will bring about improvement of academic results, improve teaching standards in schools, address the need for affirmative action and are the most effective means of achieving rationalisation.

The fact that the ex DET comprises the smallest of the total number of teachers in the Western Cape, adds to the perception of domination by the other two ex departments (HOR and CED) with regard to both physical and human resourcing policies. This is borne out by remarks made in the last section of the survey where a teacher remarked that : "This department is so biased that it only concentrates on Coloureds and Whites The department is preaching equity whilst on the other side is promoting racism." Other remarks included accusations of "Collusion by the whites and coloureds", "The WCED is only securing jobs for coloureds and whites". The presence of suspicion is revealed more overtly through criticism of particularly the handling of the redeployment process - or lack thereof.

The ex CED teachers are uncertain as to the outcome of national policies and would seem to be protective of previous gains. This is illustrated by fears that the diminishing of physical and human resourcing to their previously "whites only" schools will negatively affect teaching standards and bring about a concomitant lowering of examination results. It is also illustrated by the successful court injunction by a previously "whites only" school to protect the right of their Governing Body to employ teachers whom they deem to be suitably qualified.

The ex HOR teachers appear to be the most traumatised - possibly as a result of a perception of always being "in the middle" of national politics. In this respect the so-called "coloured" teachers perceive themselves as being once again at the centre of a polarised political dispensation. This perception by the ex HOR teachers in the WCED might stem from a condition where, although being classified as previously disadvantaged, they face the loss of the most teachers due to policies perceivably aimed at equalisation between "whites" and "blacks." As a result they regard the system as further disadvantaging those it was intended to help. The fact that 94,7 of the ex HOR teachers cited **Fear of Unemployment** as an influencing factor in rationalisation, points to grave concern with and adds to the spiritual demoralisation of HOR teachers with regard to job security.

The trauma experienced by ex HOR teachers, stemming from the fact that while they were previously disadvantaged they now have to **lose** teachers due to the process of rationalisation, has been equated in recent newspaper reports as a "split personality" condition. Evidence from the data would support this view since it appears that they support rationalisation but are suspicious of its implementation.

One of the prime reasons for the prevalence of the above perceptions in the Western Cape Education Department - notwithstanding the best intentions of a National post apartheid dispensation - is a deficient conceptualisation on the part of the National ministry of education of the principle of **equity** and the provision of clear guidelines as to its implementation in the provinces. Its qualitative element has been eroded and politically obscured as a result of the pursuit of a market driven education system.

Concluding Remarks

While this research study has focussed on teachers' responses to Rationalisation in the Western Cape Education Department, it is undeniable that many of the findings would find an echo in the national arena.

An evaluation of the results of the process of rationalisation since the publishing of the White Paper of 1995, would reveal the present state of affairs in the Western Cape Province :

- * **Equalisation has not been achieved**
- * **The process of achieving Equity - in terms of redressing decades of biased physical and human resourcing - is not being adequately addressed**
- * **No Redeployment has taken place**
- * **Virtually no upgrading and retraining of educators has taken place**
- * **The setting of a National Teacher / Learner ratio as an instrument towards achieving rationalisation is being negated by a growing tendency to allow provinces to set ratios based on their budgets - which could lead to a larger learner to teacher ratio**
- * **Indiscriminate granting of the VSP has resulted in an exodus of experienced teachers from the profession**

Thus, in terms of the above, it must be concluded that while rationalisation as a means towards effecting **equality** in the system is broadly accepted by the majority of teachers, the **implementation process** in the Western Cape has not produced the level of results envisaged by the White Paper of 1995.

This contention is borne out by the overriding impressions that I have gleaned from an analysis of the responses of teachers to rationalisation - linked to the particular historical context in which they were made.

Policy Recommendations

While this study has focussed on the responses of teachers in the Western Cape to rationalisation its implications with regard to policy recommendations are inextricably linked to National initiatives and cannot be viewed in isolation.

Similarly, education is but one of a set of interlinking components that are designed to recreate a post apartheid, democratic dispensation that will take South Africa into the new millenium - and cannot be viewed in isolation from transformation in other components like economic, social and political life.

Thus, although it is said in hindsight, an **Impact Study** with regard to rationalisation and the effects of its implementation could have proved crucial to its broad acceptance and might have resulted in a more stable and accepted education situation.

If the aim of post apartheid education, especially with regard to the Western Cape, is to build and foster a National character, then the first purpose of its macro policy should be to redress past injustices with regard to human and physical resourcing. Included in this should be a proviso that **the process of redressing past injustices** be evaluated every five years to ascertain its success. This is paramount to ensuring stability and harmony in the education sector and should express itself in a visible and unambiguous way in the implementation of policy.

Present market related tendencies like compelling education "clients" to pay for the use of municipal services like electricity and water are counter productive to delivering basic education to poor communities disadvantaged by apartheid and serve only to accentuate the perception that money has replaced colour as a discriminating factor.

Recent policy shifts, by the National ministry, away from the insistence on adhering to the determined teacher / learner ratios and the condonation of the determination of ratios based on budgets - allied to amendments to the Education Act allowing "rich" communities to "purchase" more teachers, negates the setting of national ratios. It gives credence to the influence of monetarist policies which put the provision of basic education at the mercy of "Lowest common denominator" politics.

The above tendencies need to be counter-balanced by equity-related policies promoting affirmative action and biased human and physical resourcing in order to prevent severe disruption to the delivery of basic education to the disadvantaged. The application of multi-tiered funding levels to accommodate the discrepancy could be an alternative.

This province urgently needs to take cognisance of the impact and destabilising effect that the skewed past is having on perceptions with regard to the implementation of education policies. Thus due regard must be given to processes like the dissemination and flow of information, the conscious management of the potentially harmful implementation of rationalisation and the visible pursuit of more equitable policies to compensate for the negative human and physical resourcing of the apartheid years.

APPENDICES

- A. Letter from WCED detailing permission to do research.**
- B. Questionnaire on responses to Rationalisation**
- C. Letter from South African Teachers' Association (SATA)**
- D. Letter to schools completing the questionnaires**

TEACHER SURVEY

Dear Educator

The attached questionnaire is aimed at gathering information about the views of teachers with regard to the rationalisation process in the Western Cape Education Department. The survey covers five schools each in the previous House of Representatives (HOR), Department of Education and Training (DET) and the Cape Education Department (CED) and includes primary and secondary schools.

Your co operation and participation will contribute greatly towards the formation of a report which highlights the views of a cross section of the teaching fraternity.

Please note that approval for approaching schools to assist in the survey has been granted by the Western Cape Education Department. Information regarding the research has also been sent to SADTU, CTPA and SATA.

Ultimately it remains the prerogative of staffs and individual members to participate and it is in this regard that I wish to appeal to you, the stakeholder, to assist me in this endeavour.

A copy of the final report will be sent to schools for perusal by all teachers.

Thank you for your co operation.



M. L. GASANT

School of Education
University of Cape Town
RONDEBOSCH 7700

PS. Should you wish to contact me please telephone (021) 311142 (Fax 319034) at school or 6370855 at home.

STRUCTURE OF THE SURVEY

This survey is structured to include the following aspects which could have a bearing on and/or inform the views expressed :

- * Biographical details
- * Professional details
- * Knowledge about relevant literature
- * Issues pertaining to and factors affecting Rationalisation

INSTRUCTIONS AND GUIDELINES

1. Participation is **VOLUNTARY** and **ANONYMOUS**. Please do not write your name on any of the pages.
2. It is very important that the questionnaire be completed fully, correctly and candidly.
3. The responses should reflect **YOUR PERSONAL VIEWS**.
4. All responses will be consolidated so that no individuals can be identified.
5. The responses will thus be dealt with in the strictest confidence -please seal the envelope containing your responses.
6. Please follow the instructions very carefully and use ink/ballpoint when filling in your responses.
7. Please **DO NOT USE THE COLUMN MEANT FOR THE COMPUTER**.
8. Please **DO NOT USE TEACHING TIME TO COMPLETE THE QUESTIONNAIRE**.
9. The questionnaire should take roughly 20 minutes to complete.

THANK YOU FOR YOUR CO OPERATION

PART ONE

Make a cross in the appropriate block. If you make an error, cancel out and re-mark.

For
Computer

1.1. Previous Education Dept.	DET	1	1 <input type="checkbox"/>
	CED	2	
	HOR	3	
1.2. Gender	female	1	2 <input type="checkbox"/>
	male	2	
1.3. Age group in years	20 - 29	1	3 <input type="checkbox"/>
	30 - 39	2	
	40 - 49	3	
	50 +	4	
1.4. Marital Status	Married	1	4 <input type="checkbox"/>
	Not married / Single	2	
1.5. Education Sector	Primary	1	5 <input type="checkbox"/>
	Secondary	2	
1.6. Highest Academic Qualification	Matric	1	6 <input type="checkbox"/>
	Bachelors Degree	2	
	Post Grad. Degree	3	
1.7. Professional Status	Teacher: Post level 1	1	7 <input type="checkbox"/>
	Head of Department	2	
	Deputy/Sen. Deputy	3	
	Principal/Manager	4	
1.8. Teaching exp. in years	1 - 5	1	8 <input type="checkbox"/>
	6 - 10	2	
	11 - 15	3	
	16 - 20	4	
	21 - 25	5	
	26 - 30	6	
	30 +	7	

1.9. Employment Status	On Probation	1
	Temp. in a vacant post	2
	Substitute for perm. tchr	3
	Permanent	4

9

PART TWO

The following pertains to key documentation regarding pertinent educational matters. First determine whether you **HAVE** OR **HAVE NOT** read it and then use the scale below to mark off your responses :

<u>I HAVE READ IT</u> and		<u>I HAVE NOT READ IT</u> because	
Understood it fully	1	Unavailable	4
Only partially understood	2	Not interested	5
Did not understand it	3	Did not have time	6

	* <u>I HAVE READ IT</u>	* <u>I HAVE NOT READ IT</u>	
2.1. White Paper on Education (1995)	1 2 3	4 5 6	FOR COMPUTER 10 <input type="checkbox"/>
2.2. WCED Circular 94 /95 (Advertising of Vacant Posts)	1 2 3	4 5 6	11 <input type="checkbox"/>
2.3. WCED Circular 51/1996 (VSP)	1 2 3	4 5 6	12 <input type="checkbox"/>
2.4. WCED Circular 68/1996 (Sev. & Redeployment)	1 2 3	4 5 6	13 <input type="checkbox"/>
2.5. ELRC Resolution 3 of 1996 (Right =sizing)	1 2 3	4 5 6	14 <input type="checkbox"/>
2.6. Procedure Manual for Resolution 3	1 2 3	4 5 6	15 <input type="checkbox"/>
2.7. WCED Circular 92 /96 (Redeploy. & VSP Amendments)	1 2 3	4 5 6	16 <input type="checkbox"/>

2.8. If ... EQUALITY relates to the equal distribution of resources and

EQUITY relates to the redress of past/unequal distribution of resources due to Apartheid

indicate which you would use to classify the concepts below. Use the following key :

EQUALITY = 1 ; EQUITY = 2 UNDECIDED = 3

		1	2	3	FOR COMPUTER
2.8.1.	Affirmative action	1	2	3	17 <input type="checkbox"/>
2.8.2.	Even distribution	1	2	3	18 <input type="checkbox"/>
2.8.3.	Parallel provisioning	1	2	3	19 <input type="checkbox"/>
2.8.4.	Biased ratio's	1	2	3	20 <input type="checkbox"/>
2.8.5.	Identical resources	1	2	3	21 <input type="checkbox"/>
2.8.6.	Justice	1	2	3	22 <input type="checkbox"/>
2.8.7.	Redress of the past	1	2	3	23 <input type="checkbox"/>
2.8.8.	Uniform standards	1	2	3	24 <input type="checkbox"/>
2.8.9.	Equivalent allocations	1	2	3	25 <input type="checkbox"/>
2.8.10.	Fairness	1	2	3	26 <input type="checkbox"/>

2.9. Use the scale below to indicate the extent to which you Agree/Disagree with the National Teacher:Pupil ratio's of 40:1 [Primary] and 35:1 [Secondary] and its effects on the education system.

Strongly Agree	1
Agree	2
Undecided	3
Disagree	4
Strongly Disagree	5

The National Teacher / Pupil ratio :

2.9.1.	Will bring about Equality	1	2	3	4	5	27 <input type="checkbox"/>
2.9.2.	Will bring about Equity (redress past injustices)	1	2	3	4	5	28 <input type="checkbox"/>
2.9.3.	Adequately addresses Recon= struction & Development	1	2	3	4	5	29 <input type="checkbox"/>
2.9.4.	Is the ratio the country can presently afford	1	2	3	4	5	30 <input type="checkbox"/>
2.9.5.	Addresses the need for affirmative action	1	2	3	4	5	31 <input type="checkbox"/>

FOR COMPUTER

2.9.6.	Will improve academic results of students	1	2	3	4	5	32	<input type="checkbox"/>
2.9.7.	Will improve teaching standards in schools	1	2	3	4	5	33	<input type="checkbox"/>
2.9.8.	Will encourage private schooling	1	2	3	4	5	34	<input type="checkbox"/>
2.9.9.	Will bring about fundamental change in education	1	2	3	4	5	35	<input type="checkbox"/>
2.9.10.	Most effective means to achieving rationalisation	1	2	3	4	5	36	<input type="checkbox"/>

PART THREE

3.1. Regarding initiatives in the National transformation process in education, indicate the extent of your agreement / disagreement with its practical implementation in the Western Cape. Use the scale below to indicate your responses :

Strongly Agree	1
Agree	2
Undecided	3
Disagree	4
Strongly Disagree	5

The Practical Implementation of the Transformation process in education in the Western Cape is :

3.1.1.	Generally in line with the National initiatives	1	2	3	4	5	37	<input type="checkbox"/>
3.1.2.	Conforms to the Reconstruction and Development Programme	1	2	3	4	5	38	<input type="checkbox"/>
3.1.3.	Ensures attainment of Equality (resources, opportunities etc)	1	2	3	4	5	39	<input type="checkbox"/>
3.1.4.	Ensures attainment of Equity (redress of past injustices)	1	2	3	4	5	40	<input type="checkbox"/>
3.1.5.	Is committed to ensuring full community participation	1	2	3	4	5	41	<input type="checkbox"/>
3.1.6.	Entrenches the influence of Organised Labour	1	2	3	4	5	42	<input type="checkbox"/>
3.1.7.	Indicates the authority of National over Provincial	1	2	3	4	5	43	<input type="checkbox"/>

FOR
COMPUTER

3.1.8.	Provides adequate protection for Unrepresented Labour	1	2	3	4	5
3.1.9.	Is generally moving at a too fast pace	1	2	3	4	5

44 45

3.2. Rate the degree of the impact that the following factors have had on the rationalisation policy in the WCED. Use the scale provided below.

Powerful impact	1
Clear impact	2
Undecided	3
Limited impact	4
No impact	5

3.2.1.	Fear of unemployment	1	2	3	4	5
3.2.2.	Inadequate severance packages	1	2	3	4	5
3.2.3.	Unfair Labour practices by WCED	1	2	3	4	5
3.2.4.	Racism in general	1	2	3	4	5
3.2.5.	Racial composition of the Western Cape	1	2	3	4	5
3.2.5.	Ignorance of the issues	1	2	3	4	5
3.2.6.	Influence of political parties	1	2	3	4	5
3.2.7.	Influence of provincial elections	1	2	3	4	5
3.2.8.	Fear of drop in standards of teaching and learning	1	2	3	4	5
3.2.9.	Administrative mismanagement by WCED	1	2	3	4	5
3.2.10.	Unclear directives from National Educ. Ministry	1	2	3	4	5
3.2.11.	Influence of Teacher Organisations	1	2	3	4	5
3.2.12.	Influence of the Media	1	2	3	4	5
3.2.13.	Redeployment issues	1	2	3	4	5
3.2.14.	Inadequate consultation of all stakeholders	1	2	3	4	5

46 47 48 49 50 51 52 53 54 55 56 57 58 59 60

FOR
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3.2.15.	Mismanagement of the process at school level	1	2	3	4	5
3.2.16.	Practical implications of phasing in T/P ratio's	1	2	3	4	5

61 62 **PART FOUR**

4.1.	Are you a registered member of a union or professional organisation	Yes	1
		No	2

63

4.2.	How did you receive information concerning agreements reached in the ELRC ? <u>INDICATE 2 (two) main sources ONLY.</u>
------	--

4.2.1.	At Union / Organisation meetings	1
--------	----------------------------------	---

4.2.2.	From the press / media	2
--------	------------------------	---

4.2.3.	From the shop steward at school	3
--------	---------------------------------	---

4.2.4.	From the principal	4
--------	--------------------	---

4.2.5.	From teacher colleagues	5
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64 65

4.3.	Are you the <u>only person</u> in your immediate family that is employed	Yes	1
		No	2

66

4.4.	Are you the largest salary earner in your household	Yes	1
		No	2

67

4.5.	Are you awaiting retirement ?	Yes	1
		No	2

68

4.6.	Do you regard yourself as sufficiently skilled for another job besides teaching	Yes	1
		No	2

69

4.7.	All things considered, would you still choose teaching as a career	Yes	1
		No	2

70

4.8.	How many years do you still want to stay in the teaching profession	-5	1
		5	2
		10	3
		20	4
		Until I retire	5

71

**Wes-Kaap Onderwysdepartement
Western Cape Education Department
iSebe leMfundo leNtshona Koloni**

Navrae Enquiries iMibuzo	Dr J.B. Mobbs	Verwysing Reference Ubhekiso	L.15/73/7	Telefoon Telephone iMfonomfono	403-6093
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Mr M.L. Gasant
40 Orion Road
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ATHLONE
7764

Kantoor van die
Office of the
i-Offisi ye

Head: Education

Privaatsak
Private Bag

9114

Dorp/Stad
Town/City
iDolophi/iSixeko

CAPE TOWN

Poskode/Postal Code
iKhodi lePosi

8000

Faks
Fax 419-5967

Datum/Date
Umhla

16 October 1996

Dear Mr Gasant

SURVEY: RATIONALISATION IN THE WESTERN CAPE EDUCATION DEPARTMENT

Your application to conduct a survey amongst teachers at schools of the ex-Departments in the Western Cape is approved subject to the following conditions:

1. The principals/teachers/pupils are under no obligation to assist you in your investigation.
2. The principals/pupils/schools should not in any way be able to be identified from the results of the investigation.
3. All arrangements concerning your investigation should be done personally.
4. The conditions, as stated in 1 - 3 above, should be submitted unamended to the school principal where the intended research is to be conducted.
5. A brief summary of the content, findings and recommendations should be provided to the Director: Curriculum Management (Research Section).
6. In addition to the brief summary as mentioned in par 5, the Department requires that a copy of the completed report/dissertation/thesis be sent to:

The Director: Curriculum Management
Research Section
Western Cape Education Department
Private Bag 9114
CAPE TOWN
8000
SOUTH AFRICA

Due to the fact that you are finalising your studies an exception is made to grant you permission to conduct your survey in the last term of the school year.

Success in your survey.

Kind regards

J. M. S. G.
HEAD: EDUCATION



South African Teachers' Association

Telephone 021 - 6868521/2
Fax 021 - 6892998

6 Park Road
Rondebosch
7700

MDR/PTJ

14 October 1996

Mr M L Gasant
40 Orion Road
Surrey Estate
ATHLONE
7764

Dear Mr Gasant

Thank you for your letter concerning your research project. My organisation has no objection to your approaching its members to complete the questionnaire, but it must be understood, of course, that no individual teacher can be bound by this decision.

May I wish you well in this project and I look forward to reading your report once your research has been completed.

With kind regards

MIKE REELER
DIRECTOR



LANTANA STREET
LENTEGEUR
MITCHELL'S PLAIN
7785
TEL: 31112, FAX: 31903
PRINCIPAL: M. L. GASANT
DEPUTY PRINCIPAL: A. C. J. J. THILAK

LANTANA STRAAT
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TEL: 31112, FAX: 31903
PRINCIPAL: M. L. GASANT
ADJUNK PRINCIPAL: G. E. EDWARDS



Re: _____ DATE: _____
In sake: _____

.....
.....
.....
.....

Dear Sir / Madam

I hereby wish to thank you and your staff for assisting me with my research project. Please be assured that a copy of the summary of the report will be sent to your school in 1997.

Herewith please find an appropriate number of questionnaires. Should you require more feel free to contact me. I have also included a letter of authorization from the WCED.

Thanking you in anticipation

Yours in education

.....
M. L. GASANT

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