

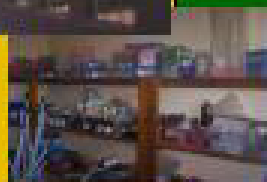
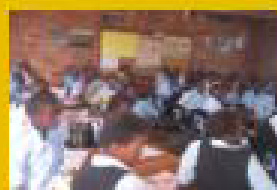


education

Department of Education
REPUBLIC OF SOUTH AFRICA

Teachers For The Future:

Meeting Teacher Shortages to Achieve Education For All



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List of abbreviations

ABET	Adult Basic Education and Training
CEM	The Council of Education Ministers
CEPD	Centre for Education Policy Development, Evaluation and Management
CHE	Council on Higher Education
COLTS	The Culture of Learning, Teaching and Service Campaign
CTP	Committee for Technikon Principals
DoE	Department of Education
DoL	Department of Labour
ECD	Early Childhood Development
ELSEN	Education for Learners with Special Educational Needs
GET	General Education and Training
FET	Further Education and Training
FTE	Full-Time Equivalent
HEDCOM	The Heads of Education Departments Committee
HEIs	Higher Education Institutions
HEQC	Higher Education Quality Committee
HRD	Human Resources Development
INSET	In-service Education and Training
ILO	International Labour Organisation
IQMS	Integrated Quality Management System
MECs	Provincial members of the executive council
MST	Maths, Science and Technology
MTEF	Medium Term Expenditure Framework
NER	Net Enrolment Ratio
OBE	Outcomes-based Education
PEDs	Provincial Education Departments
PRESET	Pre-service Education and Training
NAPTOSA	National Professional Teachers' Organisation of South Africa
NIS	National Innovation System
NSE	Norms and Standards for Educators
NQF	National Framework Qualifications
NSFAS	National Student Financial Aid Scheme
REQV	Relevant Education Qualification Value
SABC	South African Broadcasting Corporation
SACE	South African Council of Educators
SADTU	South African Democratic Teachers' Union
SAOU	Suid Afrikaanse Onderwys Unie
SAQA	South African Qualifications Authority
SASA	South African Schools Act 84 of 1996
SCEs	Senior Certificate Examinations
SET	Science, Engineering and Technology
SETAs	Sector Education and Training Authorities
SGBs	School Governing Bodies
UNESCO	United Nations Educational, Scientific and Cultural Organisation

Executive Summary

In March 1990, a historic meeting took place in Jomtien, Thailand, between representatives of the Governments of the World. That meeting was a turning point in the Universal struggle for action regarding the World Declaration on Education for All (EFA): Meeting Basic Learning Needs. A Regional meeting held in April of 2000 in Dakar, Senegal, gave further impetus and a renewed commitment by governments of Sub-Saharan Africa, to meet the obligations of the “Education For All” drive by the year 2015. In Dakar 164 countries, including South Africa, dedicated themselves to the commitment now known universally, as the Dakar Declaration.

The Constitution of the Republic of South Africa and the Freedom Charter of the African National Congress (ANC) (the country’s ruling party), commit the South African government to the realization of these goals as they coincide with the mandate as espoused by the Dakar Framework for Action (2000) and the Millennium Development Goals. The South African constitution expresses a commitment to the right to basic education, unqualified by the availability of resources - or at least a progressive realization of this right. The Freedom Charter declares that: “Education shall be free, compulsory, universal and equal for all children”.¹

Teachers are a key enabling factor in improving the quality of education². Education is also a labour-intensive profession. Without adequate numbers of high quality, motivated teachers, it is impossible to achieve access to quality education. For the South African government to meet its commitment of quality education for all by 2015, it must therefore be in a position to:

- Attract young people into the teaching profession.
- Provide adequate teacher education.
- Retain qualified teachers in the profession.

To improve the quality of education a teacher redistribution and deployment project was started in 1996. The last few years, however, have recorded an increasing number of reports of teachers leaving the education system (attrition). The reasons for this teacher attrition has been attributed to several factors, including, an increasing numbers of teachers dying; a desire to leave for better paying professions; emigration; general dissatisfaction and demotivation; a lack of clear career-pathing amongst others. Although these reports cast a shadow on a once highly valued profession and on the ability of the South African government to meet its 2015 commitment, a recent study by the HSRC³ has suggested that there are conflicting views about the educator supply and demand situation in South Africa. In the early to mid 1990’s it was suggested that there was an oversupply of educators in the country. This later changed, with most commentators pointing to a shortage of educators, especially in the under-served areas.

¹ Article 4, of section 8 Of the Freedom Charter of the African National Congress, June 1955

² Education For All Global Monitoring Report, 2005

³ HSRC, 2005. Factors Determining Supply and Demand of Educators in South African public schools.

The observations by different researchers, including the Human Sciences Research Council (HSRC), made in these reports do indeed build a strong case for the suggestion that there will soon be a major shortfall in the number of teachers available if factors affecting teacher supply are not adequately addressed. Teaching now has to compete more vigorously with other career options for talented new recruits than perhaps at any time before. This is, however, not a challenge unique to South Africa. In a number of countries the teacher workforce is aging and retirements and resignations are proving hard to fill, especially in learning areas such as mathematics, languages and the sciences. It can be argued, that as long as there are systems in place to mitigate such threats, it does not naturally follow that the teaching profession is in immediate trouble.

A recurring question being posed by those critically watching issues of teacher supply and Demand in South Africa:

- ✓ Will quality teachers be available to provide quality education?
- ✓ Or is the profession cracking under the strain of poor working conditions, lack of incentives, low morale, uncompetitive salaries, an ageing workforce and the demand for ever more complex teaching abilities?

If conditions are left unchecked, or an intervention strategy not designed and implemented within the next three to four years, an increasing net replacement demand for teachers of up to 12 480 per annum new teachers into the system could be experienced between 2009 to 2015

1.1. Objectives of this study

The principal objective of this study is to assess whether South Africa will have adequate teachers to achieve the visions of Education For All (EFA) by 2015.

To achieve this, the South African government has taken a leaf from the expanded vision of the World Declaration on Education for All.

“To serve the basic learning needs of all requires more than a recommitment to basic education as it now exists. What is needed is an “expanded vision” that surpasses present resource levels, institutional structures, curricula, and conventional delivery systems while building on the best in current practices.

Through a rigorous analysis of existing literature, this report aims to contribute to the body of knowledge around the distribution and supply of educators in South Africa. It also synthesizes current research concerning teacher shortages in South Africa and seeks to investigate the expected changes in pattern of demand that may help to identify current strength and weaknesses in the teacher supply and demand equation.

In addition this report has tried to model its approach in line with the terms of reference of the International Labour Organisation (ILO) so that the report from South Africa will follow a similar framework with other countries for comparability.

1.2. METHODOLOGY

This research has made an attempt to go into detailed analysis of the factors and implications of teacher shortages, ramifications of present policies in the system, as well as made recommendations that will see the country attaining the desired goal of EFA by 2015 and ensure adequate supply and distribution of quality teachers by 2015. To do this it has employed a two-pronged approach - desktop research (literature review) of existing data and empirical research.

A desktop literature review was conducted to acquaint the research team with current and comparable research in the country. A survey was done of government policy frameworks and other documents to help understand the government's response to the perceived threat of teacher shortages. However, the secondary data used, is characterized by certain limitations, which are discussed more in detail under "Limitations to the methodology" and also feature under some of the general recommendations. Data used sought to answer specific questions, and as such are characterized by certain biases and ideologies. This study seeks to synthesize that existing information.

Secondary data sources are all listed and referenced in the Bibliography section

Possible gaps were identified based on the review, and these were managed by using a triangulated approach comprising of in-depth one-on-one interviews, focus group interviews and administered questionnaires

The focus groups were conducted in 20 districts, two of which were used as pilot sites. In each of the 20 focus groups, an average of 22 people attended the sessions. Some sessions were videotaped where deemed necessary to ease capturing of the comments and opinions. The focus groups used seven main themes for discussion. The educators were allowed to select any of the discussion topics at random in their deliberations and provide their insight and opinion on the topics and how the issues affect them. These themes were extracted from the terms of reference of the International Labour Organisation (ILO). These were:

- professional development
- professional assessment
- recruitment and induction
- careers and development
- remuneration and material incentives
- conditions of teaching and learning
- reasons and levels of teacher dis-satisfaction/ satisfaction.

The issues that were raised in each focus group were then captured under the themes that evoked their response.

The focus groups were not meant to be fully representative of the teaching profession, and hence the numbers being small, but rather were designed to capture the essence of the South Africa educator experience, views and opinions to aid the discussions along the theme issues.

Questionnaires were also developed for both teachers and management personnel at all Provincial Department of Education (PED) offices. Of 900 questionnaires that were distributed, the 27% return rate has been used to give an indication from the perspectives of management at provincial level and the opinions and ratings given by the group that did respond on time.

1.3. Limitations of the methodology

First , the research is cognisant of the limitations and complexities associated with accurate modelling of teacher supply and demand that requires statistical information that is currently not available in South Africa⁴.

Secondly , available data used in this study, was based on data predominantly from 2003, obtained from the Department of Education, Education Management Information Systems (EMIS) annual publications of education statistics. Other data used was based on Persal, but only a picture of the Public sector employed educators. The problem with this is that information on educators employed by School Governing bodies (SGB's), is not readily available except from the Annual School Survey conducted by the Department of Education EMIS directorate.

Thirdly , during the conduct of this study, data from the ASS regarding educator information was not available from several provinces.

And lastly, the study also experienced limitations with regard to questionnaire returns. The 27% out of the distributed 900 questionnaires, returned are attributed in-part to a lack of co-operation from provincial respondents.

Findings

- ✓ Despite massive strides and achievements conducted between 1994 till the present, a view of existing literature and the findings of the focus groups / indicates a system that is far from well.
- ✓ If, as suggested by this research, the teaching force is not happy enough to go into their work areas and deliver the goods; HIV and AIDS continues to ravage the teaching profession uncontrolled; our initial teacher education system is not attractive enough to new entrants and not producing enough teaching graduates; remuneration, incentives and conditions of teaching and learning are not attractive enough to attract and retain educators; educators are not evenly distributed and utilized to ensure geographic equity (between rural and urban contexts); then indeed, we do stand at the threshold of a looming shortage in teacher numbers. While there may be no immediate crisis, if the looming threat resulting from interplay of factors is not appropriately addressed, it may lead to acute shortages in teacher supply in the future.

⁴ Hall, 2002

- ✓ In South Africa, there is no separate EFA plan but the national Department of Education has made some headway in its attempts to ensure that South Africans have access to quality education, most of which are in alignment with the EFA goals.
- ✓ Although the education legislations are not developed with the EFA goal as the base principles, the South African Education legislation easily lend itself to the principles of EFA by 2015. By following the objects of the South African Constitution and the ANC Freedom Charter, their very basis is to ensure that all South Africans receive quality education presently and in the future and in so doing is congruent with the aims, principles and strategies of the EFA by 2015
- ✓ A dynamic and thriving collective bargaining facility for educators exist. This is important for the maintenance of a body of teachers that will know that their best interests are always at hand and can negotiate for better conditions of employment, conditions of work, adequate and fair remuneration, and for their own professional development, so that ultimately more quality teachers are available for the attainment of constitutional and EFA imperatives
- ✓ There seems to be a decline in number of learners. that existing drop out rates are due to poverty, illness, lack of motivation and trauma are likely to increase as cases of HIV/AIDS increases. HIV/AIDS is also likely to slow population growth rates and alter the structure of the population. As the proportion of potential parents (20-40) declines, numbers of orphaned children increase and poverty decreases school enrolment will decline and drop out rates will rise.
- ✓ If the statistics showing a decline in learners and decline in educators is correct, then it is safe to assume that the South African teacher supply and Demand is in a state of equilibrium. In other words if the decline in numbers of learners is matched by decline in educators or matched by a corresponding equivalent change in teacher supply, there will be no teacher shortages in South Africa by 2015 or any other year.
- ✓ Teachers' supply and demand is affected by interplay of factors. The impact of HIV/AIDS on teachers is profound. More teachers are getting ill absent and are dying. Yet teacher supply is struggling to keep up with this demand. Teacher Education institution are not producing enough teachers as the institutions struggle to attract new candidates to the profession.
- ✓ Research reports conducted between 1997 and as recently as May 2005, on teacher supply and demand in South Africa have led to an understanding by stakeholders within the system, that there are presently no quantitative shortages of teachers in South Africa. However, the same studies have made it clear that if present attrition and turnover issues are not addressed, whether related to HIV/AIDS or not, the implications are immense. In the education system this translates, amongst other things into shortages in educator supply and costs in recruitment, training, development and mentoring.
- ✓ The present composition of teachers portrays a profession that is characterized by shortages of female leaders and of female educators in critical subjects such as

Mathematics, Science and technology. It also depicts a profession with an attrition rate that is not balanced by an adequate supply of new educators

- ✓ Teacher supply is reduced by a hemorrhage of teachers who leave the profession before retirement age and keeping teachers in the teaching profession has become a challenge. This certainly has also had an impact on the quality in the teaching force
- ✓ This implies that South Africa may experience shortages at two levels. First there is likely to be increased shortages of teachers in rural school due to difficulty in recruitment of educators willing to work in rural contexts. Secondly there is likely to be a shortage in urban schools with urban teachers leaving teaching to explore other career opportunities.
- ✓ A considerable number of those who do decide to join the teaching profession leave for other jobs long before reaching retirement age. Factors contributing to these high rates of teacher attrition include illness and bottlenecks in teacher preparation systems. A variety of unattractive conditions of service also play a strong role in limiting teacher supply. These include perceived low salary, arbitrary teacher deployment systems, unattractive work locations, unprofessional treatment of teachers, lack of professional development opportunities, and insufficient supportive supervision. Another strong pushing factor is the low opinion that society has of teaching. Teaching is considered a low-status career and well-qualified teachers have increasing alternative employment opportunities in other sectors of the economy.
- ✓ The combination of teachers leaving the profession in droves and of teachers dying or leaving the profession due to HIV/AIDS could lead to both qualitative and quantitative shortages if not assuaged. The HIV/AIDS pandemic could prove to be one of the biggest single contributors of a mass shortage of teachers if left to its own course.
- ✓ South Africa faces challenges with their pool of available educators. One of these challenges is that of attracting new educators into the teaching profession and another is the challenge of how to retain those already in the system. At present South Africa is not producing enough teachers to balance out the effects of annual attrition. In this section we explore the approaches employed to attract new teacher candidates and those used to retain the educators in the profession.
- ✓ The profile of existing teacher candidates reveals that the students intending to go into teaching are more likely to be female, young, be studying English rather than science, engineering and are white. There are a few black student teachers particularly in the foundation phase. The 'surprising factor' is that 'white participation (has) increased⁵'. The speculation is that reasons for this may be linked on the one hand to the fact that the formal economy is opening up at a faster rate for Africans than are opportunities for teachers, or relative opportunities for whites have waned faster and on the other to the increase in teacher posts created by school governing bodies

⁵ Crouch and Perry 2003

- ✓ According to some of the more current research from 1999 to 2003 there has been an overall steady decline in student-educators enrolment by approximately 24.3%. The decline in enrolment is significant among Africans
- ✓ The closure of the former colleges of education and the entrance requirements and costs of Universities and Technikons has complicated the recruitment of students in teacher education.
- ✓ However teacher recruitment targets may be lower than at present if enrolments decline or do not grow as expected.

Recommendations

Education Policy and Planning

- ✓ Provincial education departments (PEDs) should develop or refine comprehensive data systems that provide information on teacher supply, teacher quality and teacher mobility. This information must be analysed, documented and fed to the Department of Education to assist with policy formulation.
- ✓ To develop effective data systems, a high degree of co-operation among key players is critical. All necessary parties must participate in the data development and collection effort, and ministers and legislature MECs must be supportive.
- ✓ Policies for recruitment must be balanced by policies for retention. Recent studies recommended retention strategies to address impending shortages. These must include the Department of Education developing a national plan in partnership with educator and labour representatives, parents and other stakeholders⁶. It is important to listen to the teachers and address their concerns.
- ✓ Aligning recruitment policies and practices with the interests and expectations of prospective teachers will become even more crucial⁷.

Teacher Education and Professional Development

- ✓ The Department of Education and Provincial Education Department must ensure financial accessibility to teacher education through financial assistance means, such as contract bursaries.
- ✓ Every new teacher should be required to participate in a formal induction and/or mentoring programme for at least two years, to be developed at the local district level or school site to provide extensive and intensive professional development for all new teachers.

⁶ HSRC, 2005. Factors Determining Educator Supply and Demand in South African Public Schools

⁷ National Framework for Teacher Education report, 2005

- ✓ The final year of initial teacher education could be used as a period of site based teacher development through a “practical internship”.

Teacher Recruitment and Retention

- ✓ Recent research has suggested that, to ensure that there are adequate numbers of educators to serve the system⁸, there has to be an immediate increase in the number of students recruited into teacher training.
- ✓ The Department of Education must assess the supply of educators in rural areas. It must consider gender equity and consider the current shortages of trained educators in key learning areas and how recruitment and retraining of unemployed educators can alleviate existing and potential shortages.
- ✓ The department of Education must engage in a recruitment drive amongst rural communities with new entrants obtaining bursaries and reconsider an induction year in rural areas⁹. [Strategies to attract black teacher candidates particularly to specialize in foundation phase foundation must be put in place to ensure a continual supply of these teachers
- ✓ A countrywide advisory group should be appointed to plan and advocate for policies and strategies to help school districts succeed in recruiting and retaining well-qualified teachers in difficult to fill teaching fields.

Teacher Remuneration and Material Incentives

- ✓ Salary increases are the most direct and powerful way to demonstrate the value accorded to the education profession. A lack of financial progress following entry into the profession could encourage attrition after a few years and should be addressed¹⁰.
- ✓ Teachers should be released from administrative tasks and other activities that increases their workload and distract their attention.
- ✓ Teachers need more steps on their career ladders across their entire career path. The promotion structure should allow for career advancement opportunities that do not remove educators from the classroom¹¹.
- ✓ Create financial incentives to recruit and retain teachers in hard to fill (shortage area) teaching positions. Shortage areas should be defined for this purpose at the level of Districts. These incentives should be developed and tried for a three-year period and their impact on employing well-qualified teachers monitored and evaluated. Incentives might include salary increments, bonuses for continuing in teaching positions for three or five years and support for professional development. The cost of financial incentives should be shared between the education department and the provincial treasury¹².

⁸ Hall 2002

⁹ Ministerial Report on Rural Education 2005

¹⁰ HSRC, 2005. Factors Determining Educator Supply and Demand in South African Public schools

¹¹ *ibid*

¹² *ibid*

- ✓ Financial incentives offered by employers, such as scholarships, arrangements to pay specialist teachers' accumulated higher education contribution scheme (HECS) debt, and assurances of employment (often in specified rural areas), have proved successful in drawing an expanded cohort of suitable people to teaching¹³.

Teaching and Learning Conditions

- ✓ The NFTE report suggests interventions that are necessary to sustain the recruitment of teachers into teaching. For example, a campaign for the renewed status of teachers. Media campaigns to positively image teachers must be put into place.
- ✓ Public awareness and appreciation of teaching as a profession has to be raised.

¹³ National Framework for Teacher Education Report, June 2005

1. INTRODUCTION

In March 1990, a historic meeting took place in Jomtien, Thailand, between representatives of the Governments of the World. That meeting was a turning point in the Universal struggle for action regarding the World Declaration on Education for All (EFA): Meeting Basic Learning Needs. A Regional meeting held in April of 2000 in Dakar, Senegal, gave further impetus and a renewed commitment by governments of Sub-Saharan Africa, to meet the obligations of the “Education For All” drive by the year 2015. In Dakar 164 countries, including South Africa, dedicated themselves to the commitment now known universally, as the Dakar Declaration.

The 6 goals that are re-affirmed and participants collectively re-committed to at the Dakar conference are¹⁴:

- (i) expanding and improving comprehensive early childhood care and education, especially for the most vulnerable and disadvantaged children;
- (ii) **ensuring that by 2015 all children, particularly girls, children in difficult circumstances and those belonging to ethnic minorities, have access to and complete free and compulsory primary education of good quality;**
- (iii) ensuring that the learning needs of all young people and adults are met through equitable access to appropriate learning and life skills programmes;
- (iv) achieving a 50 per cent improvement in levels of adult literacy by 2015, especially for women, and equitable access to basic and continuing education for all adults;
- (v) eliminating gender disparities in primary and secondary education by 2005, and achieving gender equality in education by 2015, with a focus on ensuring girls' full and equal access to and achievement in basic education of good quality;
- (vi) improving all aspects of the quality of education and ensuring excellence of all so that recognized and measurable learning outcomes are achieved by all, especially in literacy, numeracy and essential life skills.

The Constitution of the Republic of South Africa and the Freedom Charter of the African National Congress (ANC) (the country's ruling party), commit the South African government to the realization of these goals as they coincide with the mandate as espoused by the Dakar Framework for Action (2000) and the Millennium Development Goals. The South African constitution expresses a commitment to the right to basic education, unqualified by the availability of resources - or at least a progressive realization of this right.

¹⁴ DoE, 202. EDUCATION FOR ALL: Status Report South Africa

The Freedom Charter declares that: “Education shall be free, compulsory, universal and equal for all children”.¹⁵

With the transformation of the country after the changeover of Government in 1994, South Africa became part of the wider international community and signed a number of international agreements aimed at improving the provision of quality education. This implies provision of conditions to ensure that these objectives are met. Ten years into South Africa’s transition to democracy, few areas of education have remained untouched by the drive to overcome the legacy of apartheid. Between 1994 and 1999 a range of initiatives were introduced aimed at improving access, equity and quality and education spending became oriented to the achievement of equity and ceased to be determined on a racial basis..

Teachers are a key enabling factor in improving the quality of education¹⁶. Education is also a labour-intensive profession. Without adequate numbers of high quality, motivated teachers, it is impossible to achieve access to quality education. For the South African government to meet its commitment of quality education for all by 2015, it must therefore be in a position to:

- Attract young people into the teaching profession.
- Provide adequate teacher education.
- Retain qualified teachers in the profession.

To improve the quality of education a teacher redistribution and deployment project was started in 1996. The last few years, however, have recorded an increasing number of reports of teachers leaving the education system (attrition). The reasons for this teacher attrition has been attributed to several factors, including, an increasing numbers of teachers dying; a desire to leave for better paying professions; emigration; general dissatisfaction and demotivation; a lack of clear career-pathing amongst others.

Although these reports cast a shadow on a once highly valued profession and on the ability of the South African government to meet its 2015 commitment, a recent study by the HSRC¹⁷ has suggested that there are conflicting views about the educator supply and demand situation in South Africa. In the early to mid 1990’s it was suggested that there was an oversupply of educators in the country. This later changed, with most commentators pointing to a shortage of educators, especially in the under-serviced areas.

The observations by different researchers, including the Human Sciences Research Council (HSRC), made in these reports do indeed build a strong case for the suggestion that there will soon be a major shortfall in the number of teachers available if factors affecting teacher supply are not adequately addressed. Teaching now has to compete more vigorously with other career options for talented new recruits than perhaps at any time before. This is, however, not a challenge unique to South Africa. In a number of countries the teacher workforce is aging and retirements and resignations are proving hard to fill, especially in

¹⁵ Article 4, of section 8 Of the Freedom Charter of the African National Congress, June 1955

¹⁶ Education For All Global Monitoring Report, 2005

¹⁷ HSRC “The Health of our Educators” report, (2005)

learning areas such as mathematics, languages and the sciences. It can be argued, that as long as there are systems in place to mitigate such threats, it does not naturally follow that the teaching profession is in immediate trouble.

Recurring questions being posed by those critically watching issues of teacher supply and Demand in South Africa:

- ✓ Will quality teachers be available to provide quality education in South Africa?
- ✓ Is the profession cracking under the strain of poor working conditions, lack of incentives, low morale, uncompetitive salaries, an ageing workforce and the demand for ever more complex teaching abilities?

Statement of intent:

There is compelling evidence that South Africa will suffer from a catastrophic shortage of teachers, sufficiently equipped to offer quality education to learners at the different phases of the South African education system. In as much as the focus for 2015 is primarily on the foundational and primary phases, the problems will be felt right through all the levels of the system, unless an intervention strategy is designed, funded and implemented within the next three years to avoid the shortage being unmanageable. This report captures the essential considerations informing this statement.

1.1. Objectives of this study

The principal objective of this study is to assess whether South Africa will have adequate teachers to achieve the visions of Education For All (EFA) by 2015.

To achieve this, the South African government has taken a leaf from the expanded vision of the World Declaration on Education for All.

“To serve the basic learning needs of all requires more than a recommitment to basic education as it now exists. What is needed is an “expanded vision” that surpasses present resource levels, institutional structures, curricula, and conventional delivery systems while building on the best in current practices.”¹⁸

Through a rigorous analysis of existing literature, this report aims to contribute to the body of knowledge around the distribution and supply of educators in South Africa. It also synthesizes current research concerning teacher shortages in South Africa and seeks to investigate the expected changes in pattern of demand that may help to identify current strength and weaknesses in the teacher supply and demand equation.

¹⁸ Dakar Declaration “Framework for Action”, 2000

The ILO Framework seeks to achieve the following :

1. To investigate the context of the national education system

by exploring:

- The overall structure of the South African education system.
- The demographics of the system with regard to learners/students in the system and providing projections to 2015.
- The financing or funding of the system to ensure sustainability of the system towards meeting its commitment to EFA 2015.
- The governance / administration of the system at different levels down to the local school level.
- Teacher education and training requirements.
- Public support and constituent considerations for the education system in South Africa.

2. To determine the composition of the teaching profession

by examining:

- The numbers of teachers by level of education and component type.
- Gender distribution of teachers by level of education and positions of responsibility.
- The age distribution of teachers by level of education.
- The geographic distribution of teachers by national and provincial sub-units (regions / districts etc.).
- The existence or non-existence of auxiliary teaching staff or any less than fully qualified teachers engaged in part-time or full-time teaching.
- Teacher qualifications: This would include the numbers or percentages of teachers at the official qualification levels by gender, age and geographic distribution.
- The professional development of teachers: estimates of numbers or percentages of teachers having access to and undergoing professional development.
- The retention and distribution practices of the system: numbers leaving the profession and reasons.

3. To explore teacher candidates, recruitment, education and professional development by looking at:

- Perceived difficulties in attracting individuals to the profession.
- The qualifications and motivations of persons who choose to enter the profession.
- Identified weaknesses in initial teacher training programmes, structure and content affecting different strata of the teaching sector.
- Deficiencies in the skills and competencies of the present working teacher force and motivation.
- Professional development.
- Professional assessment tools and methodologies such as the IQMS.

4. To examine the employment, careers, teaching and learning conditions

by looking at:

- The recruitment and induction practices used in the Department of Education system for new and returning teachers.
- The placement criteria for first assignments .
- Mentoring by experienced teachers.
- The impact, weaknesses, reforms on recruitment and job satisfaction in rural and disadvantaged areas.
- The transfer and promotion criteria, including their application on vulnerable or marginalized groups.
- Remuneration and material incentives packages.
- Teaching and learning conditions.
- Leave provisions.
- Targeted incentive programmes.

5. To investigate mechanisms of social dialogue and participatory decision-making in education by looking at and documenting:

- The information sharing process on education policies and planning between education authorities, private school employers and teachers organizations.
- Structures incorporating teachers into EFA and other major education reforms.
- The mechanism of consultation between different parties and stakeholders on a variety of major issues.
- Negotiation and collective bargaining mechanisms.

6. To make policy recommendations on:

- Education policy and planning with attention to teacher involvement at school and district level through elected representatives.
- Teacher professional development.
- Recruitment and retention, career incentives and disincentives.
- Teacher remuneration and material incentives.
- Teaching and learning conditions.
- Social dialogue between employers and unions on teacher shortages issues.

As much as the report is modelled along the lines of the ILO framework, certain emphasis has been placed on areas that are of particular importance for the development and sustainability of the South African Education System.

The report is therefore structured into 8 sections.

Section 1: Introduction

This section introduces the objectives of the report, the methodologies employed to obtain data for the report, the limitations associated with the study and definition of selected concepts used in the study.

Section 2: Context of the National Education System

This section introduces the reader the nature of South Africa. The section explores how the context of South Africa's national education system is aimed at improving access and provision of quality education in South Africa and in turn how these efforts contribute to the fulfilment of goals of EFA for 2015.

Section 3: Composition of the Teaching Profession

A detailed look at the demographics that make up the teaching profession. This looks at gender balance, trends and projections based on historical data from South African research and implications for 2015

Section 4: Teacher Retention in South Africa

An analysis of the major factors that lead to the current retention rates in the teacher profession. This also deals with the causes of some of the factors that make up the attrition rate. The discussion has as a final endpoint, the nature of what would be needed to retain teachers in the system under conditions that would make them stay willingly.

Section 5: Implications of HIV/AIDS for Teacher Supply and Demand

The section looks at studies done in this area where the rates of infection, trends and demographics and scale of the problem as it applies to educators and implications for the education system.

Section 6: Improving Teacher Supply

This section is about improving numbers of candidates into teacher training. It looks at the entrance requirements into Higher Education Institutions. The factors that mitigate against interested candidates. The responsiveness of the Higher Education Institutions towards addressing the problems of candidates and choices of specialisation in scarce subjects

Section 7: Conclusions

Section 8: Recommendations

1.2. METHODOLOGY

This research has made an attempt to go into detailed analysis of the factors and implications of teacher shortages, ramifications of present policies in the system, as well as made recommendations that will see the country attaining the desired goal of EFA by 2015 and ensure adequate supply and distribution of quality teachers by 2015. To do this it has employed a two-pronged approach - desktop research (literature review) of existing data and empirical research.

A desktop literature review was conducted to acquaint the research team with current and comparable research in the country. A survey was done of government policy frameworks and other documents to help understand the government's response to the perceived threat of teacher shortages. However, the secondary data used, is characterized by certain limitations, which are discussed more in detail under "Limitations to the methodology" and also feature under some of the general recommendations. Data used sought to answer specific questions, and as such are characterized by certain biases and ideologies. This study seeks to synthesize that existing information.

Secondary data sources are all listed and referenced in the Bibliography section

Possible gaps were identified based on the review, and these were managed by using a triangulated approach comprising of in-depth one-on-one interviews, focus group interviews and administered questionnaires

The focus groups were conducted in 20 districts, two of which were used as pilot sites. In each of the 20 focus groups, an average of 22 people attended the sessions. Some sessions were videotaped where deemed necessary to ease capturing of the comments and opinions. The focus groups used seven main themes for discussion. The educators were allowed to select any of the discussion topics at random in their deliberations and provide their insight and opinion on the topics and how the issues affect them. These themes were extracted from the terms of reference of the International Labour Organisation (ILO). These were:

- professional development
- professional assessment
- recruitment and induction
- careers and development
- remuneration and material incentives
- conditions of teaching and learning
- reasons and levels of teacher dis-satisfaction/ satisfaction.

The issues that were raised in each focus group were then captured under the themes that evoked their response.

The focus groups were not meant to be fully representative of the teaching profession, and hence the numbers being small, but rather were designed to capture the essence of the South Africa educator experience, views and opinions to aid the discussions along the theme issues.

Questionnaires were also developed for both teachers and management personnel at all Provincial Department of Education (PED) offices. Of 900 questionnaires that were distributed, the 27% return rate has been used to give an indication from the perspectives of management at provincial level and the opinions and ratings given by the group that did respond on time.

1.3. Limitations of the methodology

First, the research is cognisant of the limitations and complexities associated with accurate modelling of teacher supply and demand that requires statistical information that is currently not available in South Africa¹⁹.

Secondly, available data used in this study, was based on data predominantly from 2003, obtained from the Department of Education, Education Management Information Systems (EMIS) annual publications of education statistics. Other data used was based on Persal, but only a picture of the Public sector employed educators. The problem with this is that information on educators employed by School Governing bodies (SGB's), is not readily available except from the Annual School Survey conducted by the Department of Education EMIS directorate.

Thirdly, during the conduct of this study, data from the ASS regarding educator information was not available from several provinces.

And lastly, the study also experienced limitations with regard to questionnaire returns. The 27% out of the distributed 900 questionnaires, returned are attributed in-part to a lack of co-operation from provincial respondents.

1.4. Definition of concepts

A number of concepts used in this study are familiar in the context of teacher supply and demand. Below we provide a definitional usage of some of the terms in this report.

✓ Teacher Shortages

In this report teacher shortages are considered less a function of how many teachers are produced than how many are lost each year through turnover and early attrition. This revolving door problem inflates the demand side of the equation and keeps schools in a perpetual state of intense pressure. In this study we look at the concept of shortages in terms of both quantitative shortages and qualitative shortages. Significant factors leading to both qualitative and quantitative shortages are:

- A recruitment shortage that occurs when too few candidates are attracted to a particular subject area or role, often because it is seen as too stressful or difficult.
- A training shortage which occurs when there are not enough accessible teacher preparation programmes to produce the number of educators needed for a particular role.
- A distribution shortage which occurs when too few qualified educators are willing to work in or relocate to the school districts having the greatest need.
- The needs as established by the PPN²⁰ and other deployment reasons.

¹⁹ Hall, 2002

✓ **Educator Supply**

Educator supply refers to the anticipated educator supply crisis. Some of the issues that should receive attention here are the pre-service training trajectory, educator demand factors, long-range age profiles of educators, the attractiveness of the educator profession, economic factors that attract and retain educators and educator attrition.

The supply of teachers can be divided into two groups:

- The current supply of teachers.
- The potential supply of teachers.

The current supply of teachers would constitute those who are currently in service in the teaching workforce. The potential supply is those who are currently not teaching but who are qualified to teach and would consider teaching if the conditions were right. The supply issues at stake are therefore ones of recruitment and retention, as well as inducing the return of individuals who have left the profession.

Teacher supply can be measured by looking at:

1. Changes in the pool of inactive teachers (PIT). 'Inactive teachers' refers to those who were previously in teaching or were trained as teachers and have either left the teaching profession or have not entered into teaching.
2. Changes in the size of the pool of recoverable teachers (PRT).
3. Changes in the supply of teachers where the supply is measured according to the Zabalza²¹ definition.
4. The number of new entrants into teaching.
5. The number of those leaving teaching.
6. The number of people enrolling and leaving teacher training programmes
7. Restricted supply due to licensing policy
8. South African Council for Educators (SACE) and its teacher requirements

✓ **Teacher Demand**

Teacher demand depends on the number of pupils in the country and on the Government's desired learner / educator ratio.

✓ **Educator Utilization**

Some of the issues that should receive attention in terms of educator utilization are - the efficacy of the current post provisioning approach; district-level deployment of educators; school-level time management; the role of SGBs; class size; classroom technology; and systems of support, reward and punishment for educators.

²⁰ Post-Provisioning Norms and Standards

²¹ The supply of teachers as defined by Zabalza is the total number of people serving as a teacher (Zabalza, et al., 1979)

²¹ HSRC; MTT Report 2005

✓ ***Educator Development***

Educator development: The effectiveness of existing training programmes, training systems that can reach all educators over a space of time, appropriateness of current training materials and schools-based and district-based educator development initiatives are some of the issues that should receive attention.

✓ ***Educator Identity***

This refers to the way educators view themselves, how they viewed by society, and how this impacts on educator policy and strategy.

✓ ***Teacher Attrition***

Teacher attrition: In a study conducted by the Human and Sciences Research Council for Education Labour Relations Council ²² during 2004, educator attrition is usually for a given time period, and is therefore defined as the number of teachers / educators that have left the employment of the department of education within that period.

2. CONTEXT OF THE NATIONAL EDUCATION SYSTEM

The government that came into power in the year 1994 inherited an education system that was characterized by inequalities in the provisioning of education resources and un/under qualified educators. Although ongoing attempts to address such inequalities are in place there are still gross qualitative shortages. Nevertheless, access to education by all children has improved significantly since 1994 and the system can now account for more than 95% of children of school-going age.

The South African Government has made great effort to ensure that the country is well placed towards meeting its 2015 commitment of ensuring that every learner especially in foundation phase will have access to free and quality education. Policies on the progressive allocation of resources also mean that the poorest learners are receiving a bigger share of the non-personnel budget than was the case in 1994²³. This is significant in that it is a step towards ensuring that all children in South Africa will have access to schooling despite their financial status.

The education system of South Africa can therefore best be appreciated when viewed against the backdrop from which it has emerged in the last twelve years. A total landmass of 1,219,090 km² is home to a population of just a little over 44million people, with a 48% and 52% male to female percentage ratio. An urban to non-urban percentage of 53.7 and 46.3 respectively is also a major factor in understanding the dynamics of the country that has just come out of a long legacy of oppression and divided apportionment of resources. A racial divide of Blacks, Coloured, Indians/Asians and Whites split along a 76.7%, 8.9%, 2.6% and 10.9% respectively makes up the fabric of society and provided the political will for the beginning of a long transformation process that has seen numerous policies being designed and passed through parliament to make a better South Africa for all its inhabitants.

The current education system itself is divided into three main phases: General Education, Further Education and Higher Education. Distinct areas of operation that enable the authorities to easily and efficiently gauge performance, resourcing and the general health of the sector characterize each of these phases. Transformation within the system has seen some blurring between the previously distinct elements of each phase. Some of this has been because of policy requirements such as that of lifelong learning, which by its very nature requires a virtually seamless integration and overlap of the different sectors.

South Africa has also been experiencing a period of profound economic, social, technological, occupational, cultural and demographic change. It has had to accommodate this accelerated pace within a shorter time span than most developed countries. The school

²³ Department of Education, 1994

system is expected to serve the needs of society and when that society is undergoing such significant change pressures emerge to improve the alignment between school and society. Effective school systems need to have the adaptability to engage constructively with society in the light of new needs and developments. The notion of the National Qualifications Framework (NQF) seeks to do just that. In an effort to transform education and training in South Africa, the NQF has been designed to:

- Combine education and training into a single framework, and bring together separate education and training systems into a single, national system.
- Make it easier for learners to enter the education and training system and to move and progress within it.
- Improve the quality of education and training in South Africa.
- Open up learning and work opportunities for those who were treated unfairly in the past because of their race or gender.
- Enable learners to develop to their full potential and thereby support the social and economic development of the country.²⁴

The NQF offers a standard yardstick for measuring and ensuring quality of learning to our learner and “teacher-in-training” population. This will have a profound impact on the quality of learning and teaching in line with EFA by 2015

2.1. Major achievements in education over the past decade

Over the past decade the national Department of Education has made some headway in its attempts to ensure that South Africans have access to quality education. Most of the achievements are in alignment with the EFA goals. They include:

- Access to primary and secondary schooling has improved, with near universal enrolment in primary schooling and 86% enrolment in secondary schooling achieved by 1998. The participation rate among girls is also among the highest in the world. Growth in learner numbers usually translates into growth in teacher demand. The more learners the system absorbs, the more quality educators the system will need.
- Access to school education was further improved by exempting poor learners from paying school fees and outlawing discrimination against, and exclusion of, learners who cannot afford school fees. A plan of action to progressively increase access to free education for all was made public in June 2003.
- Enhancing access to Higher Education institutions through the establishment of the NSFAS in 1996. The Scheme disbursed over R2,6 billion to almost half a million students in HE institutions between 1996 and 2001. This however needs to be expanded to include a more effective financing of candidates that would like to go into Teacher Education programmes, particularly those from historically disadvantaged communities.

²⁴ South African Qualifications Authority, “National Qualifications Framework – HTML Brochure” (SAQA web site: www.saqa.org.za)

- There has been an improvement in the performance of learners throughout the schooling system. Especially in the Grade 12 Senior Certificate examination where the pass rate has improved from 53% in 1999 to 68% in 2002. This indicates a steady improvement in the quality of education in our secondary school. A combination of factors, such as closer monitoring of poorly performing schools, directed professional development programmes aimed at improving educators' knowledge capacity and teaching methodologies have contributed to such improvement.
- There has been an improvement in the qualifications of educators, with the proportion of under-qualified educators being reduced
- More equitable learner: educator ratios have been established. From an average of 43:1 in 1996 to 35:1 in 2000, through redeployment and post-provisioning strategies in favour of areas of greatest need. This contributes to improved teaching and learning conditions
- Per-capita expenditure on learners has been increased from R2 222 in 1994 to R3 253 in 2000, while achieving inter-provincial equity.
- The Further Education and Training and Higher Education systems have been restructured to make their programmes more relevant to the needs of students and the economy and to reconfigure their institutional landscapes from an apartheid structure to a rationalized one that eliminates unnecessary duplication and promotes growth, rejuvenation and cooperation
- The growth of democracy, and the promotion of values and moral regeneration is being nurtured through the establishment of the South African History Project and the Values in Education Initiative. The Manifesto on Values, Education and Democracy, produced in 2001, laid the basis for a comprehensive and ongoing advocacy campaign, and provided a practical framework for instilling and reinforcing the values of the new South Africa in learners and promoting the concepts of democracy, national pride and identity in the classroom.
- A national strategy for mathematics, science and technology education was established in 2001. The strategy identifies 102 schools with a specific mandate to promote, especially among girls, study in these fields.
- Illiteracy is being reduced and a literacy among the population improved through the establishment of SANLI, the reading advocacy project Masifunde-Sonke and Adult Basic Education and Training programmes.

The above achievements have a direct contribution to the efforts by the government to ensure access to quality education for all by 2015.

The South African government has not only focussed on the implementation of the EFA goal, but has gone beyond that to include policy and operational regulations for other phases as well. This is an indication of the commitment of the government to rollout quality education at all levels of South African society. Further more during the past ten years of democracy, the

government also introduced a number of policy and legislative measures in its quest to realize the right to quality education. These are discussed in subsequent sections.

Looking back at the history that South Africa comes from in the 50 years, the most compelling achievements towards gearing the country for adherence to obligations such as the EFA by 2015 and others, within education, have occurred during only the last 10 years.

It is acknowledged that each country has its own problems and historical differences, but were it not for a broad-based transformation involving an entire societal structure, South Africa could have done more than has been done to date.

The road ahead towards ensuring that all the pillars of the education system will be in a position to embrace and hold onto the ideal represented by EFA by 2015, is a long and tortuous one and a lot more will have to be done to get to where South Africa should be by then. Better implemented and enforced legislation, better and more responsive funding mechanisms, better education of teachers equipping them with the skills and knowledge to face the real class-room world, curricula that will take into account the fact that the world has become a global village and definitions of literacy and learning have evolved to suit the bigger landscape, all have to be designed and implemented for the benefit of the generations that will be the true beneficiaries of EFA by 2015.

2.2. Overall structure of the South African education system

One of the achievements of the South African government was the dismantling of the race-segregated, unequally resourced educational structures into a single, cohesive national education system, which is organised and managed by the national Department of Education (DoE) and nine Provincial Education Departments (PEDs). The former arrangement was not inclusive of a larger, majority section of the population. With the Freedom Charter as a reference, and the Constitution of South Africa as the Supreme authority, structures and mechanisms were being put in place throughout Government to ensure that the principles of Basic Human Rights and fundamental human dignity were being restored. These principles tie in very well with the Millennium goals and again showed a concerted effort by the government to move in a direction that will ultimately lead to the attainment of the 2015 Millennium goals.

Formal education in South Africa is categorized according to the three levels of the National Qualifications Framework (NQF) from the South Africa Qualifications Authority (SAQA).

Table 2.1 National Qualifications Framework (NQF)

NQF Level	Band	Qualification Type
8 7 6 5	Higher Education and Training	<ul style="list-style-type: none"> • Post-doctoral research degrees • Doctorates • Masters degrees • Professional Qualifications • Honours degrees • National first degrees • Higher diplomas • National diplomas • National certificates
Further Education and Training Certificate (FETC)		
4 3 2	Further Education and Training	National certificates
General Education and Training Certificate (GETC)		
1	General Education and Training	Grade 9 ABET Level 4 <hr/> National certificates

Source: SAQA (South African Qualifications Authority)

The General Education and Training (GET) band consists of the Reception Year (Grade R) and learners up to Grade 9, as well as an equivalent Adult Basic Education and Training (ABET) qualification.

The Further Education and Training (FET) band consists of all education and training from the National Qualifications Framework (NQF) Levels 2 to 4 (equivalent to Grades 10-12 in schools) and the National Technical Certificate 1 to 3 in FET colleges.

The Higher Education (HE) band consists of a range of degrees, diplomas and certificates up to and including postdoctoral degrees.

These levels are integrated within the NQF provided by the South African Qualification Authority (SAQA) Act, 1995 (Act 58 of 1995).

The nature of use of the NQF is that it provides a standard framework of assessing and evaluating qualifications in an effort to address issues of quality. This quality translates favourably towards quality of teaching and learning that has a direct influence on 2015 and the supply of quality-based teachers for the system of education in South Africa.

2.3. Education policy and the legislative framework

In South Africa, there is no separate EFA plan. Education development and education reform initiatives are integrated into national strategic plans, policies and programmes for education.

²⁵All policies and education legislations introduced by the Ministry of Education since 1994 are aimed and geared at transforming the national system of education and training. The same policies although not developed with the EFA 2015 goals, still work towards the achievement of those principles and goals set out by the EFA 2015. The Department of Education declares its vision as being of:

A South Africa in which all its people have equal access to lifelong education and training opportunities, which will contribute towards improving their quality of life and building a peaceful, prosperous and democratic society.

The National Department of Education

South African Education policy is informed by the following legislations²⁶:

²⁵ DoE, 2002. EDUCATION FOR ALL: Status Report South Africa

²⁶ These legislation and policy frameworks are accessible in the open domain. URL. <http://www.gov.za>; Doe 2001, EDUCATION IN SOUTH AFRICA: Achievements since 1994

- The *Constitution of the Republic of South Africa, Act 108 of 1996*, which guarantees the right of all South Africans to a basic education.
- The *South African Schools Act* of 1996 (SASA) forms the legal foundation for schools in the country and makes schooling compulsory for all learners aged seven to 15. Compulsory education is the cornerstone of any modern, democratic society that aims to give all citizens a fair start in life and equal opportunities as adults. Government is, moreover, bound by the Constitution to progressively improve access to further education and training (FET) (Grades 10 to 12 in schools). The *South African Schools Act (SASA) (1996)* promotes access, quality and democratic governance in the schooling system. It ensures that all learners have access to quality education without discrimination and makes schooling compulsory for children aged seven to 15, or learners reaching the ninth grade, whichever occurs first. It also provides for independent and public schools. The Act's provision for democratic school governance through school-governing bodies is in place in public schools countrywide. The school-funding norms outlined in the Act, prioritise redress and target poverty.
- The *National Education Policy Act 27/ 1996* is designed to identify the policy, legislative and monitoring responsibilities of the Minister of Education, and to formalize relations between national and provincial authorities. It established the Council of Education Ministers (CEM) and the Heads of Education Departments Committee (HEDCOM) as intergovernmental forums to collaborate in developing the education system. It also provides for the determination of national policies in general and further education and training, including curriculum assessment, language policy and quality assurance. The Act embodies the principle of co-operative governance.
- The *Further Education and Training Act (1998)* and the Education White Paper 4 on Further Education and Training (FET) provide the basis for developing a nationally co-ordinated system, comprising the senior-secondary component of schooling and technical colleges. It requires that Further Education and Training institutions, created in terms of the new legislation, develop institutional plans, and provides for programme-based funding and a national curriculum for learning and teaching.
- The *Higher Education Act (1997)* makes provision for a unified and nationally planned system of Higher Education and creates the statutory South African Council on Higher Education (CHE), which advises the Minister and is responsible for quality assurance and promotion. This Act and the *National Plan for Higher Education* form the basis for the transformation of the Higher Education sector. It provides the strategic framework for re-engineering the higher education system for the 21st century. The *Higher Education Amendment Act (2002)* clarifies and brings legal certainty to labour and student matters regarding the mergers of public Higher Education institutions and provides clarity on the authority to take the decision to merge and to give a name and physical location to a new institution. The *Higher Education Amendment Bill (2003)* provides for the establishment of a National Institutes for Higher Education in Mpumalanga and Northern Cape. The institutes will serve as the administrative and governance hubs for the provision of Higher Education in response to regional needs.

- The *Employment of Educators Act* (Act 76 of 1998) regulates the professional, moral and ethical responsibilities and competencies of educators. A new section was inserted into the act to enable a provincial department to appoint new recruits or applicants after a break in service, without requiring a recommendation from a governing body. It also enables the fair distribution of qualified educators by allowing provinces to distribute such educators, especially to schools in rural areas.
- The *Adult Basic Education and Training Act* (Act 52 of 2000) provides for the establishment of public and private adult-learning centres, funding for ABET provisioning, the governance of public centres, and quality-assurance mechanisms for the sector.
- The *South African Qualifications Authority Act* (SAQA) of 1995 provides for the creation of the NQF, which establishes the framework for a national learning system that integrates education and training at all levels.
- The *South African Council for Educators (SACE) Act* of 2000 provides for the establishment of a council to undertake the registration of educators; promote the professional development of educators; and set, maintain and protect ethical and professional standards for educators.
- The *Education Laws Amendment Act* (Act 50 of 2002), and the *Amendment Act* (Act 63 of 2002), came into effect during 2002. The former makes provision for amending the *South African Schools Act* (SASA) (1996), to give clarity and certainty regarding the admission age to Grades R and 1 at public and independent schools. As a result of the amendment, the minimum age of admission has been lowered by six months. The compulsory school-going age remains seven to 15 years, or completion of Grade 9. A new section was also inserted to prohibit initiation practices at schools.

Although the education legislations are not developed with the EFA goal as the base principles, the South African Education legislation easily lend themselves to the principles of EFA by 2015. By following the objects of the South African Constitution and the ANC Freedom Charter, their very basis is to ensure that all South African receive quality education presently and in the future and in so doing is congruent with the aims, principles and strategies of the EFA by 2015

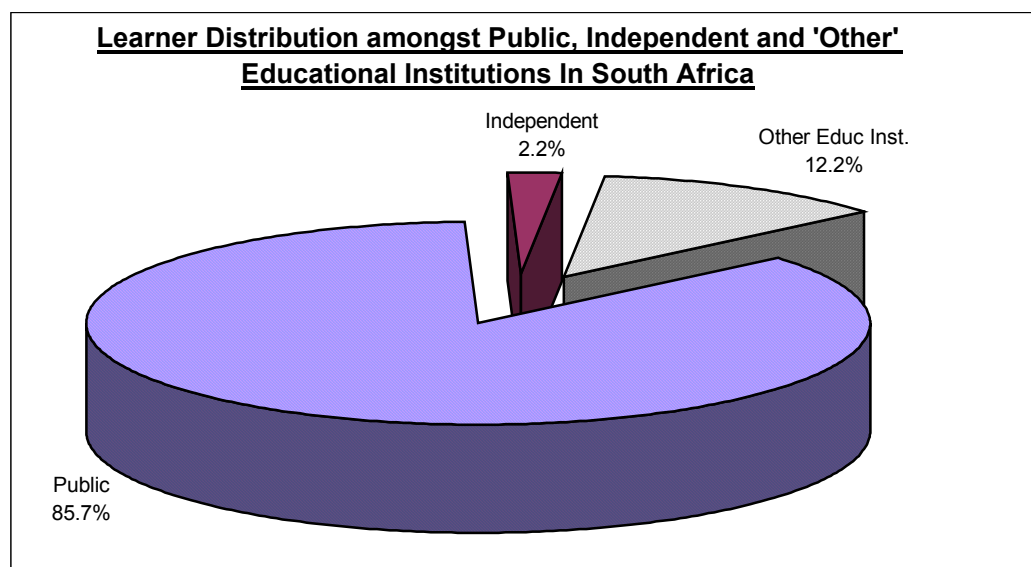
2.4. Demographics and patterns of enrolment in public schools

Numbers of learners by level of education

Current education statistics²⁷ show that in 2003 there were 13 711 564 learners and students in all sectors of the education system – including public schools, independent schools, ABET centres, ELSEN (special) schools, ECD sites, public HE institutions and public FET institutions.

²⁷ Education Statistics in South Africa at a Glance in 2003

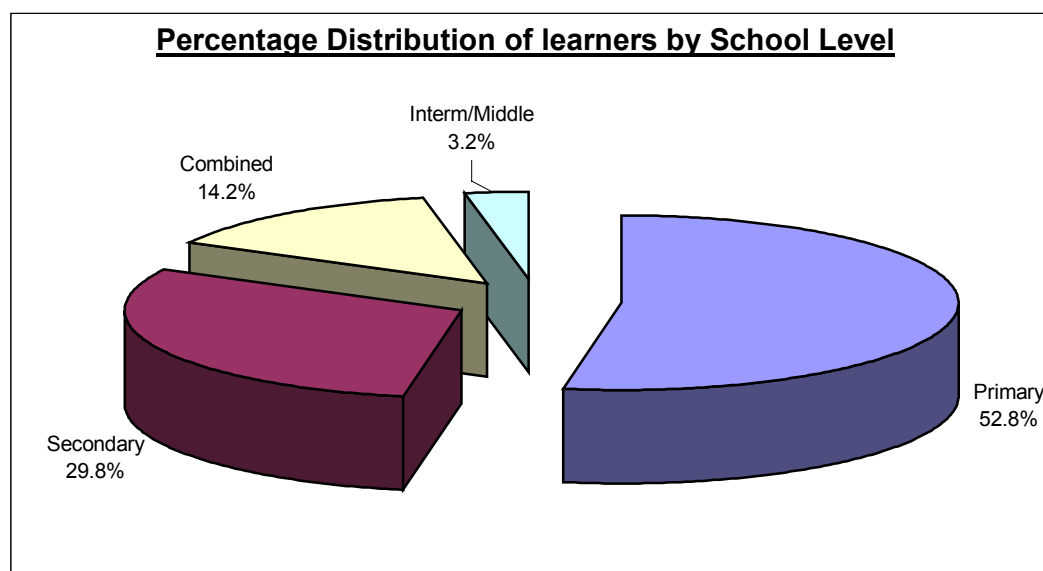
Fig 2.2 (a): Percentage of learners in the South African School System by category



Source: DoE/EMIS, Education Statistics in South Africa at a Glance in 2003

'Other' Educational Institutions represent all the Adult Basic Education and Training (ABET) centres, the Education for Learners with Special Education Needs (ELSEN) Schools, the Public Further Education and Training (FET) Institutions, the Early Childhood Development (ECD) centres and the public Higher Education and Training (HET) institutions.

Fig 2.2 (b): Percentage of learners in the South African School System by School Level



Source: DoE/EMIS, Education Statistics in South Africa at a Glance in 2003

Fig 2.2 (b) represents the percentage of learners by school level. The percentages are representative of only those learners in the Ordinary Public and Ordinary Independent schools whose total learner enrolment in 2003, was 12 038 922.

Number of learners by provincial distribution

Number of learners affects the demand and distribution of educators in South Africa. In 2003 there were 12 038 922 learners in ordinary schools in South Africa, of which 97% were in public schools and 2.4% were in independent schools. KwaZulu-Natal had the largest number of learners in ordinary schools and the Eastern Cape the second largest number.

Table 2.3. Number of learners by provincial distribution in Ordinary Public and Ordinary Independent Schools

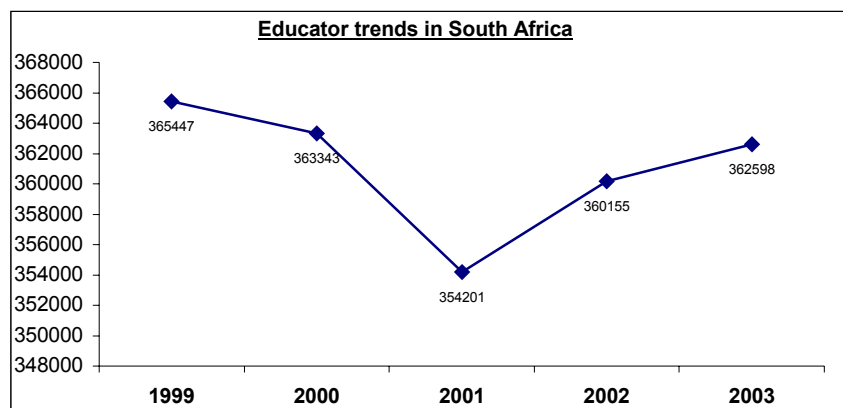
Province	Ordinary Public (OP)	% of National Total of (OP)	Ordinary Independent (OI)	% of National Total of (OI)	Total
EC	2,100,024	17.9%	16,402	5.6%	2,116,426
FS	684,134	5.8%	12,021	4.1%	696,155
GA	1,524,595	13.0%	137,222	46.5%	1,661,817
KN	2,726,271	23.2%	56,780	19.3%	2,783,051
LP	1,797,820	15.3%	19,032	6.5%	1,816,852
MP	901,732	7.7%	13,007	4.4%	914,739
NC	199,229	1.7%	2,781	0.9%	202,010
NW	880,946	7.5%	10,090	3.4%	891,036
WC	929,262	7.9%	27,574	9.4%	956,836
	11,744,013		294,909		12,038,922

EMIS-DoE, Education Statistics at a Glance in South Africa in 2003

The mainly rural provinces tend to have proportionally more schools with fewer learners than the more urbanised provinces, which have fewer schools with more learners, an indication of higher population density. Table 2.3 also shows that in 2003, the Eastern Cape, one of the more rural provinces, had 22.4% of the national total of ordinary schools serving 17.9% of South Africa's learners. While Gauteng, the most urbanised province, had 8.4% of the national total of ordinary schools serving 13.0% of the country's learners.

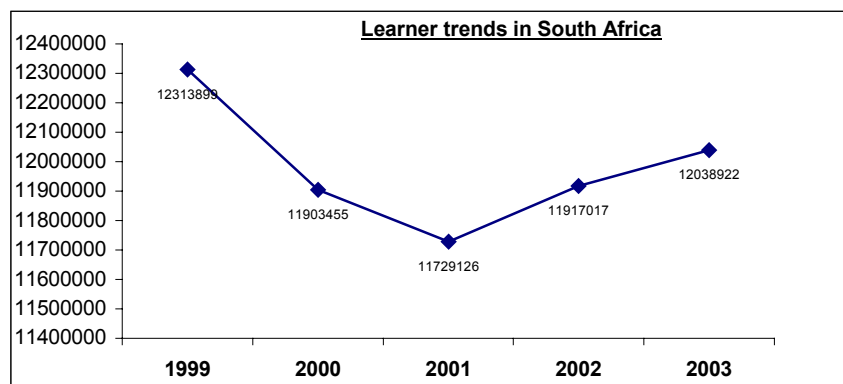
Overall between 1999 and 2003, the total number of learners in South Africa's school sector decreased 0.04 percent – from 12 313 899 in 1999 to 12 308 922 in 2003.

Figure 2.4(a) Educator Trends between 1999 and 2003



Figures 2.4(a) and (b) directly show the definite trend in a generally steady decline in learner numbers compared to the decline in educator numbers. Figure 2.4(a) shows a sharp decline in teacher numbers in 2001 but a steady and more stabilised increase between 2002 and 2003.

Figure 2.4(b) Learner Trends between 1999 and 2003



DoE – EMIS, Education Statistics in South Africa at a glance in 2003

Figure 2.4(b) shows that, between 1999 and 2001, there have been steady decline in learner numbers. It is not very clear why learner numbers were declining as there have not been any studies exploring this in any detail. However one can postulate that learner number decline in South Africa is as a result of learners dropping out of schools for different reasons, learners entering the education system late, or something to do with other reasons, as yet unknown. The two figures 2.4(a) and (b) also show matching of trends, thus indicating a responsive relationship between numbers of learners in the system with the numbers of educators. In a perfect relationship, this would translate itself into a steadily maintained

Learner: Educator (L:E) ratio is maintained. That however is seldom the case in view of all the other extraneous factors that control the rate of supply and demand of educators.

If the statistics showing a decline in learners and decline in educators is correct, then it is safe to assume that the South African teacher supply and Demand is in a state of equilibrium. In other words if the decline in numbers of learners is matched by decline in educators or matched by a corresponding equivalent change in teacher supply, there will be no teacher shortages in South Africa by 2015 or any other year.

The national picture masks certain provincial and regional disparities in the learner number and changes in teacher supply. This could distort the overall picture. Cognisance must also be given to the fact that there is a time lag between the reported state of learner enrolments and school needs, the implementation of the Post-Provisioning Norms (PPN) and the final eventual hiring and deployment of teachers to schools in reported need. This lag or “deployment flux” would have the impact of distorting the demand and supply picture at any given time. However if learner numbers increase as 2003 numbers begin to suggest and the teacher supply diminishes as seems to be happening due to factors of attrition, then South Africa may well experience a shortage of educators in 2015 or even as early as 2010.

The learner: educator ratios

There has been much discussion regarding the ‘ideal’ learner: teacher ratio. Currently, South Africa’s learner: teacher ratio is an average of between 35 and 40 learners per teacher. The ideal ratio is a function of the school level.

Despite the Department’s successes in reducing class sizes in historically disadvantaged schools, and despite a post provisioning system that currently distributes slightly more educator posts to poor schools than to non-poor schools, there are still problems with unacceptably large class sizes in some schools. There are many reasons why this problem might persist. Posts that have been created are not filled. Educators are absent from schools, increasingly due to illness. An inadequate physical infrastructure in the school forces large classes to occur.

In 2003, the national average learner-to-educator ratio at ordinary schools in the country was 33.2, ranging by province, from 29.4 in North-West to 35.9 in Mpumalanga. The national average for public schools was 34.6, and for independent schools, 12.6.²⁸

From 1999 to 2003 the potential learner population has been increasing, however, learner enrolment has been decreasing from 1997 to 2003. This may be attributed to the following:

- ✓ Different points and ages of entry at Grade 1.
- ✓ Increased learner throughput

²⁸ (Department of Education, 2005).

- ✓ increase in the proportion of vulnerable children with restricted access to school.

Enrolments at primary school level have grown at a slow rate over the period, increasing by only 6% over 10 years. In the most recent period enrolment has declined. Secondary enrolments have expanded more smoothly by more than 70% over the same period. Gender disparities in enrolment are apparent at both levels with females consistently outnumbering males. These differences have diminished slightly at primary school level but have grown at secondary school level.

2.5. Curriculum

Curriculum is central to educational policy. It provides a vision of what learning and teaching might be - including what is to be learned; processes of learning, teaching and assessment; relationships; power and authority in the system and in the school. The way that learners experience curriculum in classrooms defines their education, and hence the quality and achievements of the system²⁹.

Curriculum 2005 is the name of the National Curriculum Framework introduced into schools in 1998 and is based on the concept of Outcomes-Based Education (OBE). The national Department of Education has since revised Curriculum 2005. Key features of the revised national curriculum include comprehensive outcomes and assessment standards that indicate the knowledge and skills required for each grade and learning area, and how progress should be assessed.

Although like most of South Africa's education policies and legislations, the new curriculum was not developed based on the principles of EFA for 2015, it however provides a vehicle for the provision of quality education for all presently and in the future. The new curriculum is believed to have many positive features. These can be listed as follows:

- It breaks with the authoritarian and rote-learning styles of the past.
- It is fundamentally committed to equality in teaching and training and recognizes the urgent need to create more and better opportunities for entrance to and from all levels of teaching and training.
- It recognizes the skills and qualifications obtained in job-related training and identify the need for lifelong learning.
- It promotes a more direct integration of learning and training, of knowledge and skills to educate and train people who can do things.
- It advocates more rational integration of knowledge and skills in different learning areas and emphasise co-operative learning and the development of a basic understanding of what is learned and why it is learned.

²⁹DoE, 2001,

- It recognises the importance of an outcomes-based approach to teaching and training and promotes critical thinking and civic responsibility³⁰.

The implications for teacher provisioning are enormous. There has been a redefinition of the type of teacher now required to cater for the needs of the new curriculum in the South African education system. This redefinition has cost and time implications for the training and re-training of teachers to undertake this. There is also a shortage of educators in the system who have received formal training in both the Outcomes Based Education (OBE) and the Revised National Curriculum Statements.

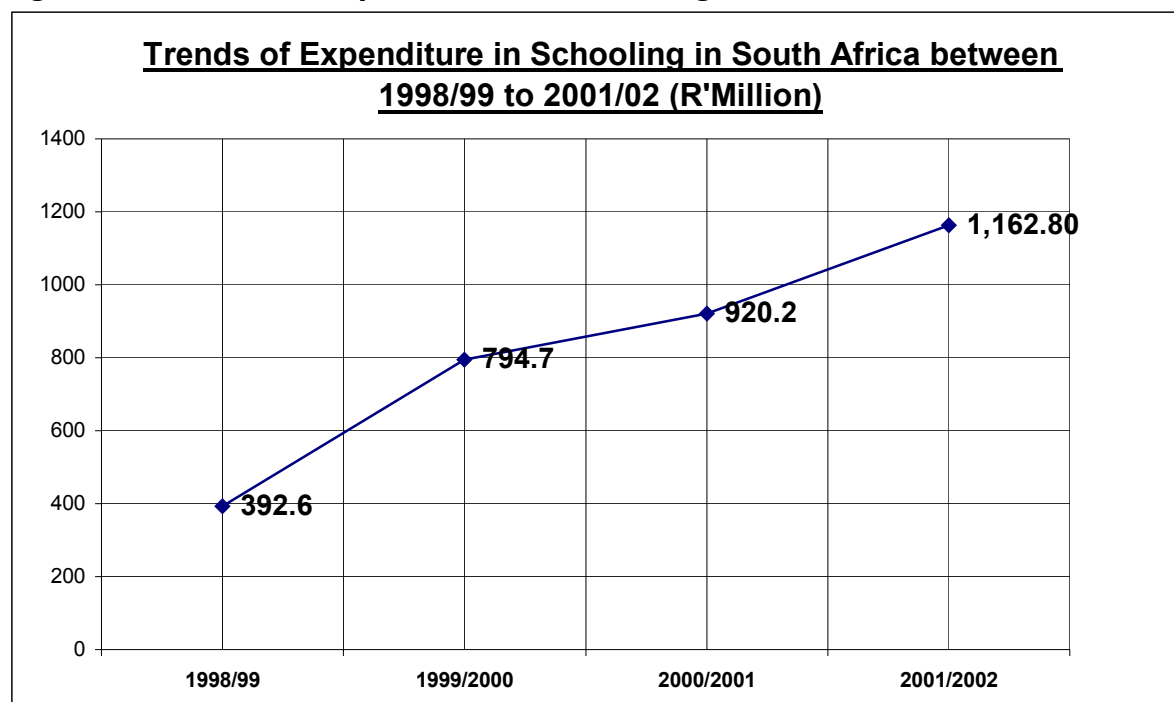
A further complication is that it has been found that there are historical shortages in critical learning areas such as mathematics, science and technology. All this means that an increasing number of highly talented and motivated people need to be attracted to teaching, especially in the fields of science, mathematics and technology and with a good grasp of new and innovative teaching and learning methodologies. These qualitative shortages are crucial to consider in the light of the EFA goals for 2015.

³⁰ Martin Legassick Web document review. http://www.unisa.ac.za/default.asp?Cmd=ViewContent&ContentID=1213&P_ForPrint=1

2.6. Financing education

Improved financing means improved access to education. It also means and improved provisioning of quality education. Compared with most other countries, education gets a large slice of the budget in South Africa - usually at least 20% of the total budget. In 2005, education received R59.7-billion, amounting to 24% of non-interest expenditure. In the coming years the education budget is expected to increase by 8.5%, with most of the additional funds to be ploughed into the provinces.

Figure 2.6. Trends of expenditure on schooling in South Africa



Source: Education Foundation Website

The steady increase in the budget allocations as reflected in the table above is a result of collaborative efforts between the national and provincial departments of education. This reflects a direct attempt by the Government of South Africa to normalise and set in place a favourable environment for the attainment of goals such as EFA by 2015, amongst others. The Department of Education had set a minimum target of R1.2 billion for the procurement and delivery of learning support materials. Each province allocates a budget for its own learning support material requirements of learners were met. The total learning support material allocation for the school year 2002 calculated from the individual budget allocations of all the provinces amounted to approximately R1.2 billion. While the target was reached after a period of three years, the challenge in the coming years will be to maintain this level of funding. A further marginal increase is still required to cater for associated expenses.

Although the government is intent on rectifying the imbalances in education, the apartheid legacy lingers on. The greatest challenges lie in the poorer, rural provinces like the Eastern Cape and KwaZulu-Natal. But even in the more affluent provinces like Gauteng and the Western Cape, schools that are generally perceived to be better resourced still suffer the same challenges. However, many of the financial problems facing the sector stem from the failure of some provinces to manage their spending properly. Several initiatives from national government are under discussion to try and find lasting solutions to these and other financially related problems. The Education Laws amendment bills of 2003, a currently proposed salary bill and other regulatory and statutory legislation have gone a long way towards addressing some of these imbalances.

Targeting schools on the basis of need

While it would be desirable for all recurrent funding of ordinary public schools, including personnel allocations, to be driven by a simple per learner formula that favours the poor, social and institutional school-level conditions are still massively unequal, provincial administrations and school governing bodies have widely varying capacities and provincial governments have different fiscal competencies, another approach is necessary to establish an attain a semblance of equity between provinces and sectors and sub-sector within a province.⁽⁶⁾

Three mechanisms have been put in place to attain this perceived equity:

- The *Equitable Shares Formula* (ESF).
- The *National Norms and Standards for School Funding*.
- The *National Post Provisioning Norms*.

The National Norms and Standards for School Funding became national policy in 1999 and are aimed at achieving equality and poverty redress at schools in terms of non-personnel expenditure within a province.

Table 2.7. Resource targeting table based on condition of schools and poverty of communities

<i>School quintiles, from poorest to least poor</i>	<i>Expenditure allocation</i>	<i>Cumulative percentage of schools</i>	<i>Cumulative percentage of non-personnel and non-capital recurrent expenditure</i>	<i>Per learner expenditure indexed to average of 100</i>
Poorest 20%	35% of the resources	20%	35%	175
Next 20%	25% of the resources	40%	60%	125
Next 20%	20% of the resources	60%	80%	100
Next 20%	15% of the resources	80%	95%	75
Least poor 20%	5% of the resources	100%	100%	25

Norms and standards for school funding in terms of the South African Schools Act, 1996 (Act No. 84, 1996).

The process works in the following way:

Each provincial education department is required to produce a Resource Targeting list of all ordinary public schools in its province, sorted according to the conditions at the school and the poverty of the community served by the school. Two equally weighted factors are to be used to rank the schools:

- *The physical condition, facilities and crowding of the school.* Using the School Register of Needs data, provincial education departments create indices based on - the range of physical facilities at the school; learner: classroom ratios; the overall condition and need for repairs; and availability of basic services. This factor is weighted 50%.
- *The relative poverty of the community around the school.* Using census, household surveys or other data, provincial education departments create indices based on, for example, the proportion of households with electricity and piped water in the community served by the school; the level of education of the parents served by the school; and other similar criteria. This factor is weighted 50%.

Five groups of schools are then identified - from poorest to least poor. The distribution by quintile will then determine the per learner allocation. Thus, allocations are made on a variable per learner basis that favours the poorer segments of the population. The most needy and largest schools will get priority in funding.

Table2.9. National table of targets for the school allocation (2006)

QUINTILE	2006	2007	2008
Q1 – poorest 20%	R 703	R 738	R 775
Q2 – next 20%	R 645	R 677	R 711
Q3 – next 20%	R 527	R 554	R 581
Q4 – next 20%	R 352	R 369	R 388
Q5 – least poor 20%	R 117	R 123	R 129
<i>Adequacy benchmark</i>	R 527	R 554	R 581

Source: Medium Term Expenditure Framework (DoE, 2004)

Table 2.9 shows the targets for the school allocation for 2006 to 2008. Each amount refers to what one learner in the school should receive. For example, the target for quintile 1 (or Q1) is R703 for the year 2006. Quintile 1 is the group of schools in each province catering for the poorest 20% of learners. Quintile 2 schools cater for the next poorest 20% of schools, and so on. Quintile 5 schools are those schools that cater for the least poor 20% of learners. Poorer quintiles have higher targets than the less poor quintiles. The 'adequacy benchmark' is the school allocation amount that Government believes is the minimum needed by each learner in each school. In 2006, this amount is R527. The main effect of the revised formula is that the poorest 40% of schools will receive 60% of the provincial schooling recurrent costs budget allocation, and the least poor 20% will get 5% of the resources.

The essence of this whole school allocation table is to highlight the South African Governments' commitment to the provision of affordable access to schools for every learner according to differing levels of monetary compensation so that even the poorest of the poor are able to get attend school at virtually no cost to them. This augurs well for South Africa's attempts at meeting its Millennium Goal of EFA by 2015.

The Rand amounts are meant as targets only. This means that a provincial education department may spend more or less than the target. However, if it spends less than the target it would be regarded as a problem, and the national department of education would investigate the problem with the Provincial Education Departments (PED).

The *National Norms and Standards for School Funding* are clearly progressive, with 60% of a province's non-personnel expenditure going to the poorest 40% of learners in public schools. The poorest 20% of learners receive 35% of non-personnel resources, while the richest 20% receive 5%. This is important towards assisting even school going children in poorer communities to be able to afford schools that will be situated closer to them and also equipped better, so as to afford them access to quality education thus meeting the 2015 obligation and constitutional imperatives.

These Norms have contributed to the narrowing of inherited inequalities from the previous government regime with regard to educator: learner ratios and the availability of more educator posts in a lot of historically disadvantaged areas.

A 2003 departmental Review of the Financing, Resourcing and Costs of Education in Public Schools³¹ undertook to improve equity and quality through a range of adjustments to the financing and resourcing of poor schools. The report revealed that despite budget reforms to ensure equality in per-learner expenditure, poorer schools need assistance in procurement of goods and services and asset management. The high cost of textbooks and an inefficiently managed ordering process, high school uniform and transport costs as well as poor management of school nutrition programmes, contribute to their financial difficulties. Recommendations included bringing down these costs significantly as well as improving systems for the management of resources. This has echoed those studies that have argued that while resource inputs have improved, the main challenges lie in the management of resources³².

Recommendations were also made on the costs of schooling. The subsequent report to the minister argued that

‘although the poorest fifth of all households pay low fees in absolute terms, of around R50 per year, this constitutes a high proportion of household income. The very poorest spend on average 2% of income on school fees, whilst the figure for middle income and high-income groups is around 1%’.

The report went on to note that 85% of parents find school fees reasonable, although only 58% pay their school fees, but that

‘the statistics are not inconsistent with a situation... where there is widespread dissatisfaction with the system of school fees. Even if “only” 15% of parents find the system of school fees unreasonable, this is a high enough figure to cause much tension in the schooling system, especially if one considers the strain that school fees places on households, and the risk that children of non-paying parents will be marginalized.’³³

However, the report does not see the fee-setting process as the central problem – parents seem to find these reasonable – but it does see the exemption process as critical. The problem here is the ‘lack of parent empowerment through information’³⁴. The report questions the legality of ‘hidden fees’ that schools charge – including the cost of food, transport and uniforms. It proposed capping school fees and introducing more stringently monitored and better informed fee-setting processes, fairer and more effective exemptions processes fully integrated into Government’s poverty alleviation programmes and transport assistance to poor learners.

³¹ Department of Education 2003b

³² Van der Berg 2001; Van der Berg, Roux and Wood 2002)

³³ Report to the Minister on the Review of the Financing, Resourcing and Costs of Education in Public Schools DoE, 2003;

³⁴ *ibid*

The Medium Term Expenditure Framework (MTEF)

In 1997, the Ministry of Finance introduced the *Medium Term Expenditure Framework* (MTEF), as part of its reform of the budget process. The main features of the MTEF are:

- Three-year forward estimates of expenditure.
- A focus on outputs and outcomes of government spending.
- A co-operative approach to expenditure analysis and planning.
- More detailed budget information to promote understanding and debate.
- Political ownership of budget priorities and spending plans.

An education sectoral MTEF review team, representing national and provincial finance and education departments, has undertaken significant analyses of provincial education spending patterns and policy priorities. The national and provincial education budgetary process also includes an analysis of cost drivers, a computer model of education spending, and recommendations on the necessity to curb enrolment bloating and to control personnel costs through improved management practices. While the MTEF sectoral review process has brought many benefits, including a collegial spirit between education and finance officials, and important analytical findings, it has not yet shown itself capable of influencing provincial education allocations for the better in the most seriously deprived, administratively vulnerable and poorest provinces.

It cannot yet be said that education budgets, taken as a whole, are vehicles for enhanced delivery of education services, or that education priorities are reflected convincingly in education budgets.

Teacher education and training requirements

Qualified teachers are among the most valuable resources of schools. They are important to ensure a quality education and central to the fulfilment of the 2015 EFA goals. In South Africa, the Department of Education (DoE) uses the Relevant Education Qualification Value (REQV) framework to evaluate and recognize the qualifications of educators. The new Norms and Standards have shifted the minimum qualification requirements for all new teachers from REQV 13 to REQV 14. The B.Ed., an Advanced Diploma in Education or another appropriate degree and an Advanced Diploma in Education have been proposed as the basic Initial Professional Education of Teachers (IPET) qualifications.

The public Higher Education Institutions (HEI's) have been reinforced and consolidated as the principal providers of Initial Professional Educator Training (IPET) programmes and their capacity nurtured to enable them to fulfil this role.

The regulation of professional teacher qualifications and the continued elevation of the standards for teachers is of paramount importance if South Africa wants to maintain its principled position in line with EFA goals of providing quality education by 2015.

It is important to note that it is not sufficient to rely only on the access to education, but quality education is the goal set by the ANC Freedom Charter, the Constitution of the Republic of South Africa and the EFA goals. Quality educators are central to quality education and thus to fulfilment of EFA for 2015.

2.10. Factors affecting the provision of quality primary education

The following factors were found to negatively impact on the quality of teaching and learning in South African primary schools:

- The physical environment of many schools is not conducive to quality teaching and learning. It was found that about 25% of primary and combined schools have no access to water within walking distance. Nearly half (48.6%) of primary and combined schools use pit latrines and these are often insufficient in number, over-utilized, unclean and smelly. Another 13.5% of schools have no sanitary facilities at all. Such sanitary conditions pose health hazards to learners and educators alike.
- The majority of schools (56.2%) have no electricity. Poor lighting and seeing conditions in these schools hampers the learning process. Lack of electricity also prevents the use of modern teaching and learning aids and equipment. About 5% of schools have decrepit and dilapidated buildings that are unsafe and unsuitable for teaching and learning.
- Most schools lack adequate supplies of teaching and learning materials. Even when available the materials are sometimes ineffectively used. The lack of lockable storage facilities makes it difficult to safeguard existing materials. There is a need for timely and adequate provision of educational materials and lockable storage facilities as well as the appropriate training of educators³⁵.

³⁵ DoE; Education for All (EFA) 2000 Assessment

2.7. Governance, administration and Public Statutory Support

Good governance and good administration is central to provision of quality education. Equally a clear, regulated, freely accessible interaction between Government, the department of Education and its public statutory partners in education is a key factor in the continued rollout of an education process, within the system, that will cater for the greater good of the communities in which the education system operates.

The National Education Policy Act (NEPA) of 1996 makes for provision for the system of governance in the education system.

NEPA further establishes the main bodies responsible for governance of the system, beginning with the Council of Education Ministers (CEM)

Bearing in mind the fact that 2015, is 10 years away, the establishment of bodies and committees that have long-term vision and sustainability is crucial to a country's social, political, educational, economic, and moral development, so that it can build a citizenry that will be able to devolve the benefits gained now, long into the future for generations to come.

With the guidance offered by the Constitution, the establishment of these bodies becomes necessary to ensure that the constitutional mandates are attained and maintained for the benefit of South Africa and all who live inside its borders.

Council of Education Ministers (CEM)

The **CEM** council, called the Council of Education Ministers, consists of the National Minister, the Deputy Minister of Education, and every provincial political head of education.

The Director-General shall attend meetings of the Council in order to report on the proceedings of the Committee, and to advise on any other matter relating to the responsibilities of the Department.

The chairpersons of the Portfolio Committee on Education in the National Assembly and the Select Committee on Education in the Senate may attend meetings of the Council.

The functions of the Council are to-

- Promote a national education policy, which takes full account of the policies of the government, the principles contained in section 4 of NEPA, the education interests and needs of the provinces, and the respective competence of Parliament and the provincial legislatures in terms of section 126 of the Constitution of the Republic of South Africa
- Share information and views on all aspects of education in the Republic; and
- co-ordinate action on matters of mutual interest to the national and provincial governments.

Heads of Education Departments Committee (HEDCOM)

HEDCOM is a committee called the Heads of Education Departments Committee and consists of the Director-General, the Deputy Directors-General of the Department; and the heads of the provincial education departments.

The functions of the Committee are to-

- Facilitate the development of a national education system in accordance with the objectives and principles provided for in the NEPA;
- Share information and views on national education;
- Co-ordinate administrative action on matters of mutual interest to the education departments; and advise the Department on any matter contemplated in respect of education, or on any other matter relating to the proper functioning of the national education system.
- The Committee has the power to establish different subcommittees to assist it in the performance of its functions, and may appoint persons who are not members of the Committee to be members of a subcommittee: Provided that the organised teaching profession shall be invited to nominate representatives as members of each subcommittee;

Consultative bodies

The Minister may, subject to any applicable law, by regulation establish such bodies as may be necessary to advise him or her on matters contemplated in section 3 of the NEPA, provided that the Minister shall establish a body to be known as the National Education and Training Council, whose membership shall reflect the main national stakeholders in the national education system, to advise on broad policy and strategy for the development of the national education system and the advancement of an integrated approach to education and training;

The Minister may also establish such other bodies as may be necessary to represent the interests of particular sectors of the education system.

Public statutory support

The education support system comprises of structures within the department and of public statutory entities. These include:

South African Certification Council (SAFCERT), now incorporated as UMALUSI – it was established in terms of the South African Certification Council Act of 1986 as amended by the Education Laws Amendment Act of 1999. The Council is primarily responsible for issuing certificates to candidates who have successfully completed school or technical college education. It ensures that such certificates represent consistent standards of education and of examination. This public entity is self-funded and does not benefit from government subsidies or transfers. Revenue comprises fees charged for issuing certificates and interest on investments. The present incorporation as UMALUSI establishes its role of assuring the

integrity and quality of the Senior Certificate examination process. It is in charge of the certification, norms and standards of curriculum and assessment of Grade 12 pupils.

The South African Qualifications Authority (SAQA) - this is a statutory body established in terms of the South African Qualifications Act of 1995. It actively oversees the development and implementation of the National Qualifications Framework (NQF). As part of its functions it focuses on ensuring access, quality, redress and development for all learners through an integrated national framework of learning achievements. SAQA provides accreditation of bodies responsible for monitoring and auditing achievements in terms of such standards and qualifications. SAQA also oversees the implementation of the NQF by ensuring the registration, accreditation and assignment of functions to the bodies, as well as registration of national standards and qualifications on the framework.

The Council on Higher Education (CHE) – this was established in terms of the Higher Education Act of 1997. It is responsible for advising the Minister of Education on all aspects of higher education, in particular the new funding arrangement, language policy and the appropriate shape and size of the higher education system. The CHE is also responsible for designing and implementing a system for quality assurance in higher education, as well as establishing the Higher Education Quality Committee. It promotes access of students to higher education; publishes an annual report on the state of higher education for submission to Parliament; and convenes an annual summit of higher education stakeholders. Qualifications standard regulation is fundamental to the consistent provision of high calibre professional teachers to ensure that supply is maintained to 2015 and beyond.

National Student Financial Aid Scheme (NSFAS) – this was established in terms of the National Student Financial Aid Scheme Act of 1999. Its role is to: allocate loans and bursaries to eligible students in public higher education; develop criteria and conditions for the granting of loans and bursaries to eligible students in consultation with the Minister of Education; raising funds; recovering loans; maintaining and analysing a database; undertaking research for the better utilisation of financial resources; and advising the Minister on matters relating to student financial aid. This fund plays a important role in funding access to teacher training by learners, who become teachers, and affords them the quality education to become effective, quality teachers. If this fund was not available, so many young, aspiring teachers would normally never have made it to college or the institutions of higher learning to become teachers or any other profession

The South African Council for Educators (SACE) – this body was established in terms of the South African Council for Educators Act, 2000. It is responsible for the registration and de-registration, promotion and professional development of educators, and for setting, maintaining and protecting the ethical and professional standards of educators. SACE acts to enhance the status of the teaching profession through the promotion of the development of educators and their professional conduct. The powers of the SACE include taking disciplinary measures against teachers who are guilty of professional misconduct. It may also strike teachers from its register - in the same way that the Medical Council scraps doctors from its roll. This is an important step towards making teaching a professional career. The SACE does not receive direct funding from government but relies on employees' membership fees

as its main source of revenue. This body provides a quality function towards the attainment of the EFA goals.

The Education Labour Relations Council (ELRC) – this body comprises representatives from the Department of Education, SACE and all educator unions. Its role is to provide a quality, effective, efficient and non-partisan administrative and facilitative mechanism for labour peace and for the development of a quality education sector.

The National Board for Further Education and Training (NBFET) - This body advises the Minister of Education on all matters related to the transformation of Further Education and Training Institutions (FETI's).

School Governing Bodies:

The South African's Schools Act governs the South African Education system. The act acknowledges the effectiveness of decentralisation and devolution of power and as such devolved school governance power to school communities. The South African Schools Act (SACA) provides for local governance of schools through the formation of school governing bodies or SGBs. These consist of the head of the school (ex officio) and representatives of the educators, learners (in secondary schools only), parents and non-academic staff of schools. Their powers include provision to set fees, subject to parental approval.

School Governing bodies also determine their own admissions policies, and this provision has led to school populations differentiated by class and race. The relationships between lay governors and school principals are examined to see if the Act's plan to separate governance and professional management has been achieved in practice. The section concludes that, despite the significant difficulties facing the educational system in South Africa, governing bodies provide a good prospect of enhancing local democracy and improving the quality of education for all learners.

Recent studies on school governance have revealed that although most schools have SGBs many of them seriously lack capacity. In many rural areas there is a high rate of illiteracy and lack of knowledge and skills to ensure the effective skills to ensure the effective functioning of these governance committees.³⁶ Many SGB members have a low level of education. Some do not even appreciate their involvement in school matters. There are indications that the parent component of the SGB does not attend meetings because they don't get paid for their role and function in the SGB. Intense training for the SGB members on their roles and responsibilities is critical. These should be conducted on an ongoing basis to among other things fully appreciate their role in the schools and to possibly eradicate the old school committee mentality of "bossing" school principals.

Focus group meetings in different provinces revealed that the above finding relates to teachers' comments during focus groups as not being happy about illiterate SGB members, some of whom cannot even write their own names to be involved in recruitment and

³⁶ Research Report on Management and Governance Challenges of rural and farm schools; 2002; Review of School governance in South African Public Schools: Report of the Ministerial Review Committee on School Governance, 2004.

interviews which result in unfair labour practices such as nepotism. SGB's are not fully involved in school matters and do not attend meetings.

Devolving school governance to communities has given the communities a larger voice in the education of their children. It also provides opportunities for the communities to augment government's resourcing and provisioning of schools. However this seems to be a benefit enjoyed mostly by wealthy communities and therefore continues a trend of unequal access to quality education. This apparent paradox is because the wealthier communities who have predominantly educated members of the community on the SGB's will generally influence decision-making processes towards what will maintain the status quo from the previous era.

Because of an enhanced ability to raise their own funds in an easier manner than rural or schools in areas of less affluence, they will also be in a better position to afford to make SGB appointments of teachers and other support staff that would not be the case in less affluent communities. This would therefore have the effect of increasing the disparity that the policy and legislation was designed to try and reduce or limit.

2.8. SOCIAL DIALOGUE AND PARTICIPATORY DECISION MAKING IN EDUCATION

South African educators have one the most progressive systems of representation through varying forums and there are many avenues for constructive communication, discussion, bargaining with employees.

A dynamic and thriving collective bargaining facility is important for the maintenance of a body of teachers that will know that their best interests are always at hand and can negotiate for better conditions of employment, conditions of work, adequate and fair remuneration, and for their own professional development, so that ultimately more quality teachers are available for the attainment of constitutional and EFA imperatives.

2.8.1. Collective Bargaining

A mature and responsible bargaining system prevails in South Africa. Apart from the 1998 national dispute on post provisioning, to which five days of schooling were lost, there have been no national labour stoppages over the past five years. Instead, the bargaining process has culminated in the following key performance related agreements:

- Job descriptions for educators - Duties and Responsibilities.
- A workloads agreement, specifying 7 hours per day at school, at least one hour per day in preparation and marking, and “up to 80 hours per annum” on INSET.
- The system of teacher developmental appraisal.

The Labour Relations Act, 1995, has created a new labour relations regime. The Education Labour Relations Council (ELRC) has had to be re-organised to conform to the provisions of this Act. In 1997, the Public Service Co-ordinating Bargaining Council (PSCBC) was established in terms of Section 35 and 36 of the Labour Relations Act, No. 66 of 1995, to strengthen the ELRC. The constitution of the PSCBC was negotiated during 1997, the founding parties of the central chamber, the National Negotiating Forum (established in terms of the South African Police Regulations, 1995) and the Education Labour Relations Council.

According to its constitution, the PSCBC may perform all functions of a bargaining council in respect of those matters that:

- a) Are regulated by uniform rules, norms and standards that apply across the public service; or
- b) Apply to terms and conditions that apply to two or more sectors; or
- c) Are assigned to the State as employer in respect of the public service that are not assigned to the State as employer in any sector.

The ELRC is now well constituted to manage labour relations matters in education. It has its own premises and a full complement of staff. Capacity building of both employer and employee parties has been undertaken through the council.

Chambers of the ELRC exist in each province. Given that most of the operational work is undertaken at provincial level, there is a proposal for each provincial chamber to appoint a permanent secretariat.

2.8.2. Teacher unions

South African teachers are highly unionised, the majority of educators are organised into four teacher unions. Namely:

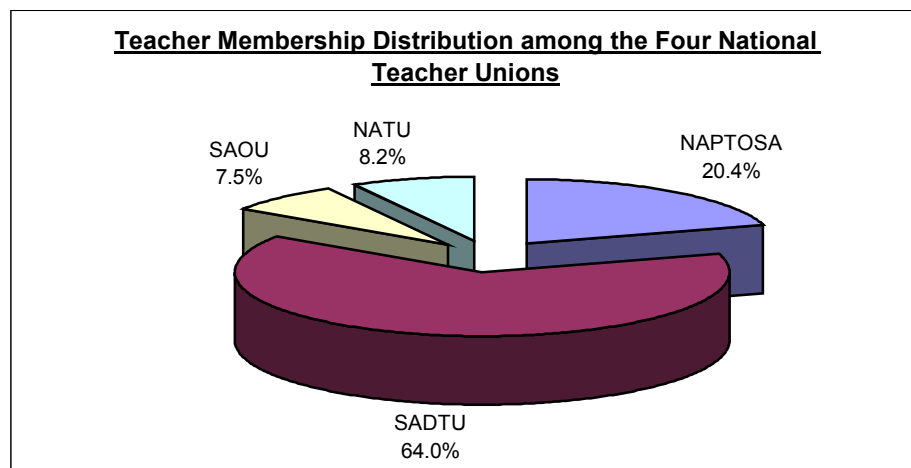
- the National Professional Teachers' Organisation of South Africa (NAPTOSA).
- the South African Democratic Teachers' Union (SADTU).
- the National Teachers Union (NATU).
- the Suid Afrikaanse Onderwysers Unie (SAOU).

The role of the unions is to represent teacher and their issues in bargaining forums with the employee (in this case the DoE).

The Ministry of Education and Teacher Unions have jointly agreed to a labour-relations framework, which encompasses both traditional areas of negotiation and issues of professional concern, including pedagogy and quality-improvement strategies³⁷.

As at 31 December 2004, the education sector union total membership was 352,436 broken down as follows:

Figure: 2.8: Teacher Membership by National Union Representation



Source: The Education Labour Relations Council (ELRC) 2005.

The availability of these avenues can contribute towards improved teacher levels of job satisfaction.

³⁷ DoE, 2001; EDUCATION IN SOUTH AFRICA. Achievements since 1994

3. COMPOSITION OF THE TEACHING PROFESSION: IMPACT ON TEACHER SUPPLY AND DEMAND FOR 2015

The present composition of teachers portrays a profession with an attrition rate that is not balanced by an adequate supply of new educators. What implications these imbalances will have for the EFA goals by 2015, can only be deduced from the trends analysis and an examination of critical factors that will have an influence on the eventual outcome.

Clearly then, if there is to be equilibrium in the supply and demand of educators, the number of educators leaving the teaching profession, needs to be balanced by the number entering the profession. According the Department of Education in 2004, a reported forecast of teacher demand and supply suggested a large and looming imbalance between supply and demand, arising from the short term administrative measures taken to control enrolment in teacher training and the lack of enthusiasm by learners to enrol as potential teachers. These factors, coupled with demographic changes and the impact of HIV/ AIDS, have created a situation where future demand is likely to be many times greater than current supply.

In this section we analyse the profile of the existing teacher corps by looking at the number of teachers in the system by gender, age, and qualification level distribution. We explore the implications of such composition on the provision of quality education now and in 2015.

3.1. Number of teachers

Research reports conducted between 1997 and as recently as May 2005, on teacher supply and demand in South Africa have led to an understanding by stakeholders within the system, that there are presently no quantitative shortages of teachers in South Africa. However, the same studies have made it clear that if present attrition and turnover issues are not addressed, whether related to HIV/AIDS or not, the implications can be devastating on the access to and provision of quality teachers within the system. It results in shortages in educator supply and increased costs in recruitment, training, development and mentoring.

Quantitative shortages are based on the projected effects of

- The impact of HIV and Aids on educators.
- Fewer candidates entering the teaching profession.
- Attrition rates among educators as a result of other factors other than HIV and AIDS.
- Trends in learner enrolments.

Although there has been uncertainty about the supply of educators in South Africa, the large stock of unemployed or underemployed people who have been trained as educators, but not employed directly in the education sector and those that are working in other sectors, ease the urgent pressure to train new educators³⁸. It is, however, important to note that while there

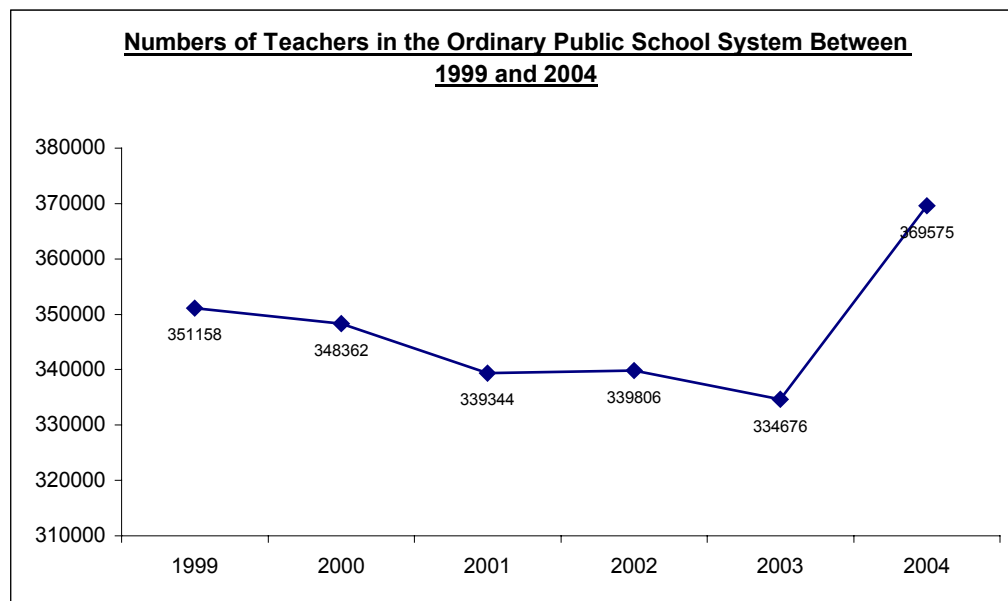
³⁸ HSRC 2005, Factors Determining Educator Supply And Demand In South African Public Schools

are teachers who have left the profession that could become available should there be an immediate shortage, the current low levels of job satisfaction might impact on the ready supply of these and other educators³⁹. Due to all these factors, the teaching profession in South Africa is seen as being characterized by both inherited qualitative shortages and “projected” quantitative shortages.

According to the Department of Education, as at 30 July 2004 there were 369,575 teachers in the public system, with more than half of this number less than 35 years old and one third having less than five years experience⁴⁰. The majority of educators had at least 10 years teaching experience. This figure reflects an increase from the figures provided by the department in 2003 as shown in figure 3.1 below. The

Figure 3.1 below⁴¹ indicates 369 575 teachers in the different components and levels of the Ordinary Public education system. Figure 3.1 also shows a steady decline in teacher numbers between 1999 and 2003. In 1999 there were 351,158 educators, compared to 334,676 educators in 2003. But 2004 shows a peaking, that has yet to be rationally explained. If the previous decline had continued and was not matched by a decline in learner numbers or matched by an adequate supply of new educators into the system then South Africa was potentially in a position to experience shortages in the near future and leading through to 2015.

Figure 3.1.1: Educator Numbers over a 6 Year Period from 1999 - 2004



Department of Education: “Education Statistics at a Glance” 2003: and PERSAL 2004

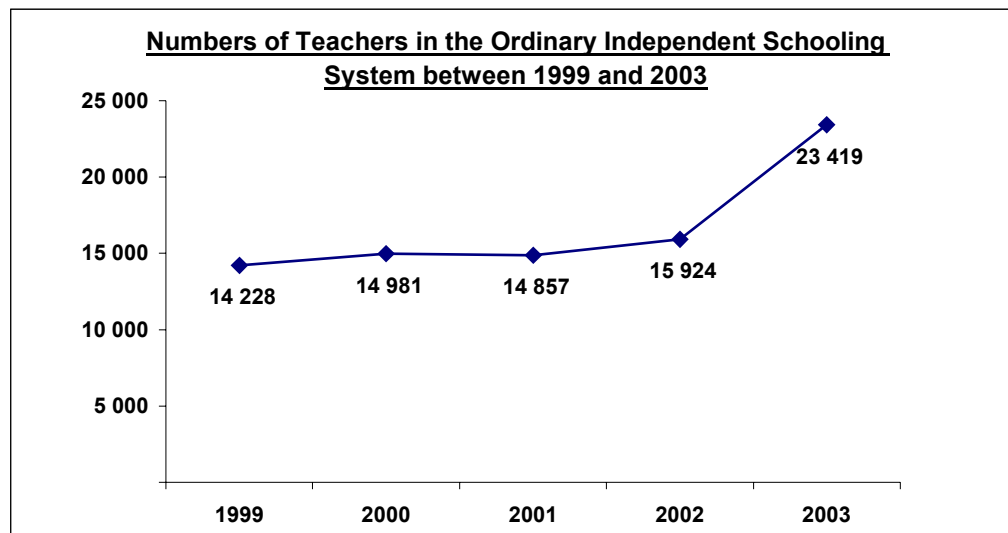
³⁹ Ibid

⁴⁰ Department of Education, 2004

⁴¹ Source: DoE – EMIS Education Statistics at a Glance 2003 and PERSAL 2004

The decline is believed to be due to a reduction in the number of temporary educators over time and also an extensive rationalization process through voluntary severance packages in the provincial education in the mid to late nineties.

Fig 3.1.2 Numbers of Teachers in the Ordinary Independent School System



Department of Education: "Education Statistics at a Glance" 2003: and PERSAL 2004

While the number of permanent educators has remained stable, the overall size of the educator workforce declined. The study revealed that the most significant and consistent provincial decline was in the Western Cape where the average number of educators decreased by over 15% in this period, followed by Limpopo and the Free State. The only province to register any noticeable increase in educator numbers was North West.⁴²

Fig 3.2 is indicative of the nature of the attraction of the Independent schools over that of the ordinary public schools. The sector recorded steady growth for the 7 years running since 1997. The number of teachers in the Independent school sector, suddenly peaked in 2003 by just a little over 47%.

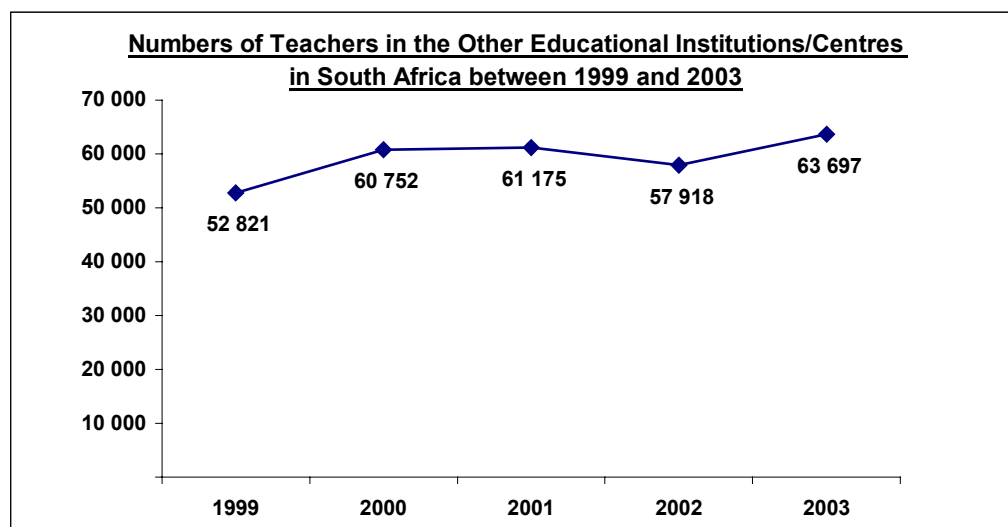
Although the 2004 Ordinary public teacher numbers reflect an increase in educator numbers it is too early to conclude that the tide is turning. Projections and forecast on teacher supply and demand indicates that for there to be sustainability, the education system requires a steady flow of newly qualified teachers. Normal attrition out of the system runs at between 5 and 5.5% per annum. This implies that South Africa needs approximately between 20,000 and 30,000 new teachers per annum over the next decade⁴³. South Africa's Initial teacher education system is currently not able to produce these figures. At best the training institutions produces a third of the projected figures (between 5000 and 7000 per annum)⁴⁴. This indicates that if Higher Education throughput does not improve, South Africa could face a severe shortage of educators in the next decade.

⁴² HSRC MTT STUDY 2005

⁴³ Crouch's – An analysis of teacher supply and demand (April, 2001)

⁴⁴ A National Framework for Teacher Education in South Africa June 2005

Fig 3.1.3 Numbers of Teachers in the “Other” Educational Institutions/Centres



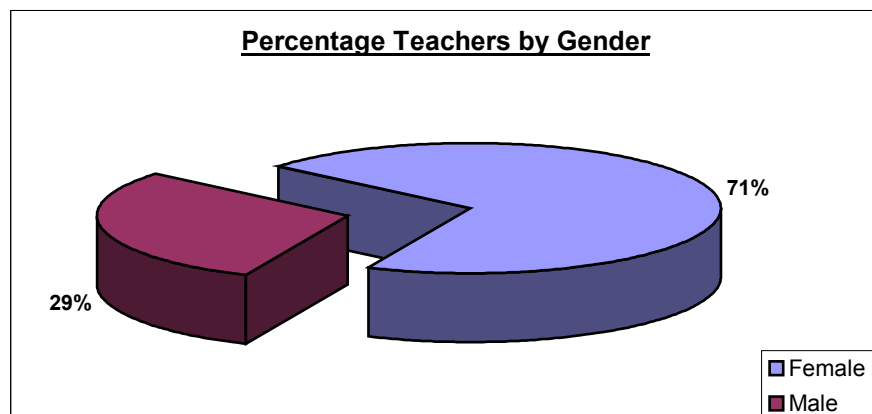
Department of Education: “Education Statistics at a Glance” 2003: and PERSAL 2004

This sector of the system is characterised by ECD, FET, ELSEN and HET sector centres. The sector is basically stable, but there is also a lot of transformation and certain levels of instability at each and every level of these centres. Reliable and firm data from these sectors, will only be available to a large extent, when the instability has come to and end.

3.2. Gender distribution

Women dominate the profession with respect to numbers. 71% of all South African teachers are women. The dominance of females among South Africa teachers in the public sector mirrors one aspect of gender roles in the society⁴⁵. Also, the overall gender imbalance in the profession translates from what many educators consider an inadequate presence of male role models in the field of teaching.

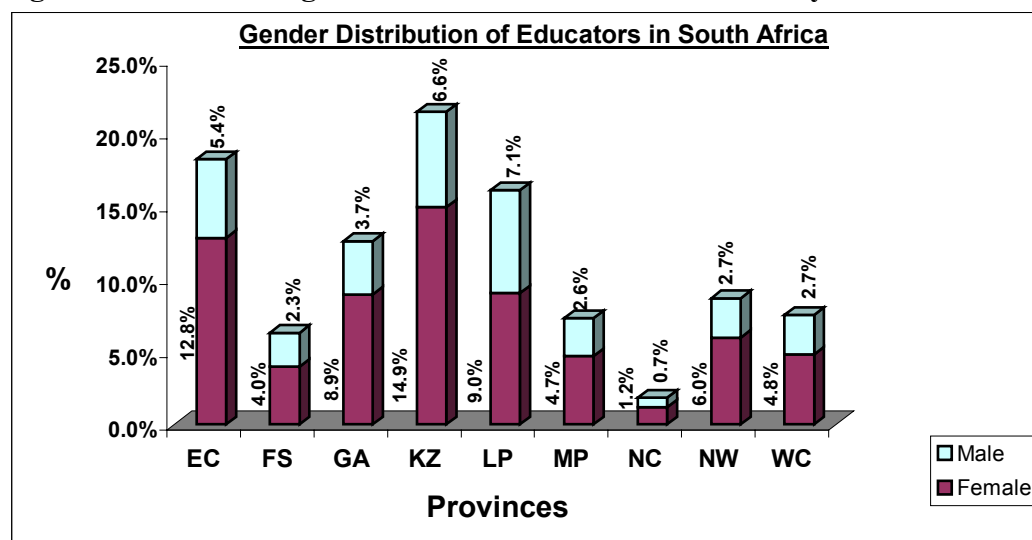
Figure 3.2.1: Distribution of Teachers by Gender



Department of Education PERSAL, October 2004

⁴⁵ HSRC, 2005

Figure 3.2.2 Percentage Gender Distribution of Teachers by Province



As can be seen from the tables above, women still dominate the teaching profession and this distribution has not changed over the past seven years. Female educators dominate the primary teaching workforce in every province with 75% and more, except for Limpopo Province where 67% of the teaching force is female.⁴⁶ At the secondary level female teachers represent approximately half or more of the teaching force in South Africa.

The geographic distribution of teachers shows that female teachers are mostly employed in the majority of schools in the Eastern Cape, Gauteng, KwaZulu Natal and Northwest. It is only in the Limpopo province where the ratio between men and women is not as vast.

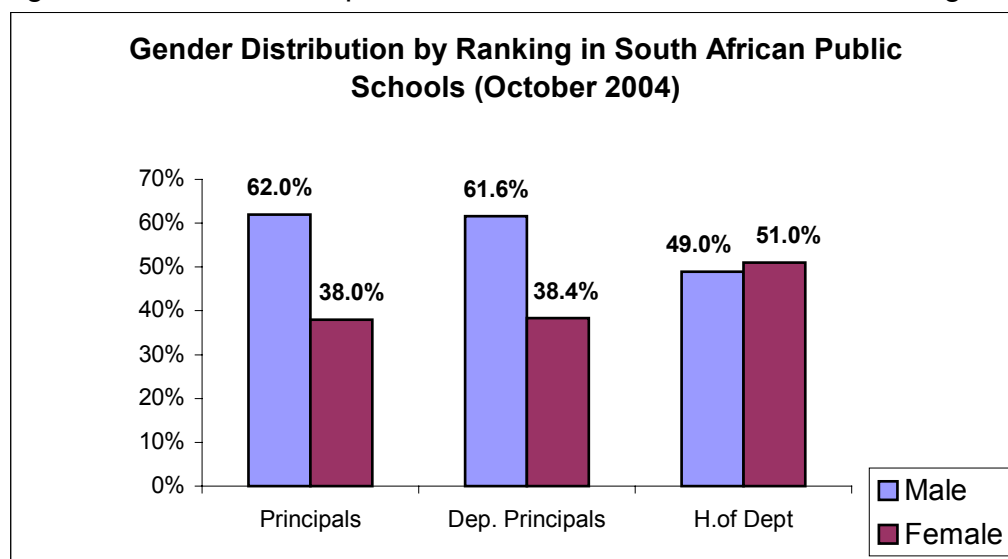
Between 1990 and 1998, worldwide trend has been towards higher percentages of female teachers at all levels of education. The largest increase being recorded in countries where the proportion of pre-primary female teachers has increased by 16% during this period.

Shortage of male role models in teaching continues to undermine attempts to attract male teacher candidates into the profession. This has an impact on supply for critical subjects as mostly male students take these subjects. While the numbers of female teachers have been rising overall, they have not been rising in secondary specialist areas such as Science and Mathematics. This presents a challenge to the department of Education to either encourage more female educators to specialize in these learning areas or interest more males who already have interest in these areas into the teaching profession.

Despite the increasing feminisation of the teaching profession, women are still under-represented in management positions in schools in the majority of provinces in South Africa. Only pre-primary schools and primary schools are largely under the responsibility of women.

⁴⁶ HSRC 2005

Figure 3.2.3 Gender Representation within different official Rankings



Department of Education PERSAL data, October 2004

The analysis of the PERSAL data in figure 3.2.3 shows us several things:

that only 38% principals are females.

that females hold only 38.4% of deputy principal posts. Only with the Head of Departments posts do we see female educators being in a slight majority at 51%.

While the data in this section makes no reference to discrimination on the basis of gender preference and sexual orientation, a variety of consequences appear to flow from these gender profiles:

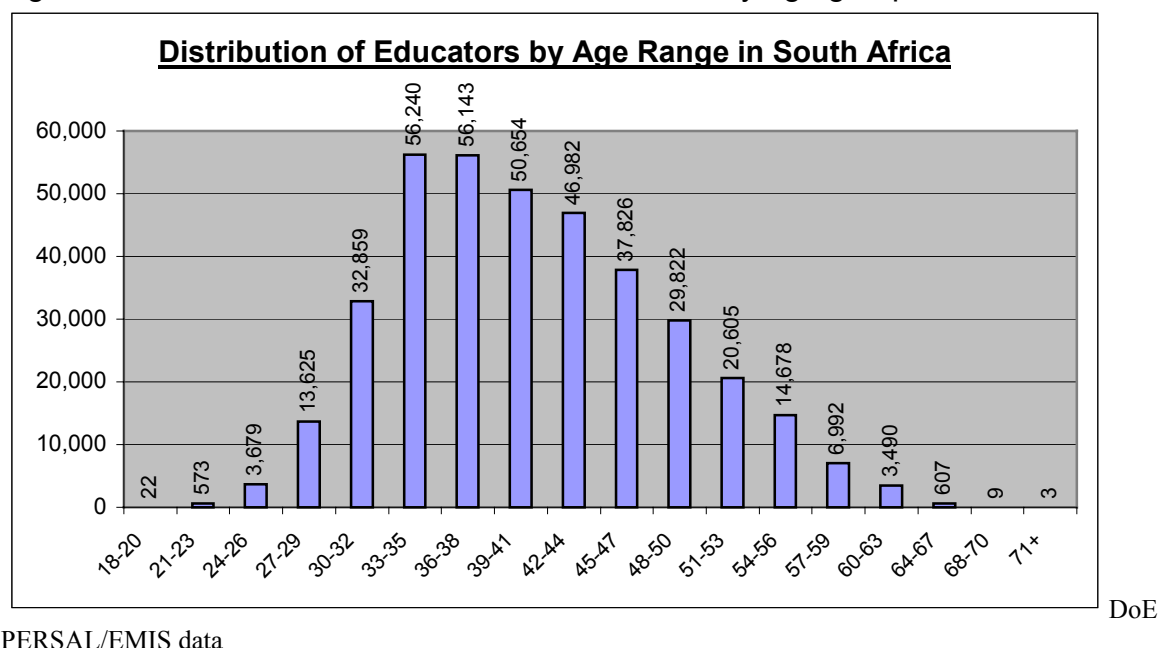
A traditional view holds that predominantly female professions, where numbers are large, tend not to be well rewarded financially.

The question of whether it is equitable or sound practice for senior and managerial posts within schools to be disproportionately filled by males in a predominantly female profession. There is a lack of balance in gender role models within a profession whose clients are more or less equally representative of both sexes. In the public debate on gender role models and the duty of care towards children, there is a tacit cultural expectation of 'a representative teaching service'.

Gender preferences in subject specialisations reinforce the perceived shortages in certain subjects. A significantly higher numbers of males than females, currently working in education, may hold academic degrees that qualify them to teach those subjects.

3.3. Age distribution

Figure 3.3.1. Number and distribution of educators by age group



21% of all South African teachers are under the age of 40, 36% of South African teachers are between the ages of 40 and 50 and, 12% of all South African teachers are 50 to 60.

Recent studies by the HSRC show that the educator workforce is generally older than the formal sector workforce. 29% of educators are 45 and older, compared to only 21% of the general workforce in the formal sector⁴⁷. However, while overall, the South Africa's teaching workforce has aged; it has not done so evenly. Important differences exist in age structures by gender, region, and school sector and school level. For example, teachers aged 55 and over form a lower proportion of the teaching workforce than do employees aged 55 and over of the overall national workforce. Thus, while within the teaching workforce, the share of older teachers has increased over the past thirty years. This appears to be concentrated in the 45–55 age group.

A substantial proportion of the teaching workforce will be eligible to retire on age grounds within the next 5–10 years i.e., 2008; 2012, a fact which has attracted considerable policy concern in recent years because this may mean that South Africa has an ageing teacher workforce.

As far as supply issues are concerned, the age profile issue appears to be of greater significance for certain areas of teaching. Given the relatively higher proportion of males in the older age bands, recruitment difficulties may be exacerbated in subject fields dominated

⁴⁷ HSRC 2005

by male teachers. This has been identified as a significant policy issue in relation to the quality of teaching, and hence, of student learning.

On the one hand, while older teachers may be highly experienced and confident in their teaching role, there is also a need for updated curriculum knowledge and pedagogical procedures, as well as for rethinking the structure of a teaching career. However, this need not entail 'new blood' policies, but might take the form of new opportunities for professional learning for older, highly experienced teachers.

If nearly 21% of all South African teachers are under the age of 40, thirty-six (36%) percent of South African teachers are between the ages of 40 and 50 and, (12%) of all South African teachers are 50 to 60, this may suggest that South Africa will have a greater problem with teacher supply due to retirement. If an increased number of younger candidates do not enter the teaching profession, and remain in it for an expanded period, the teaching profession will be impacted on negatively. They will not be adequate numbers to replace those who leave the profession due to age. To avert an imminent shortage government must embark on an intense drive to interest younger people into the profession.

Younger students, however, seem reluctant to take teaching as a career. The appeal of teaching as a career has decreased over the years. In a study conducted by Cosser in 2001 for the HSRC⁴⁸, a career in education, training and development was considered by only 1.5% of the sample surveyed (Table 4.1) when compared with a career in Business, Commerce and Management at 6.6 %, Manufacturing, Engineering and Technology 16,2% and Health Sciences and Social Services 14,6%.

Table 3.3.2: Grade 12 learner study preferences for Higher Education

Agriculture & nature conversation	5.60%
Culture & arts	4%
Business, commerce & management studies	26.60%
Communication studies & languages	2.20%
Education, training & development	1.50%
Manufacturing, engineering, technology	16.20%
Human & social studies	6.10%
Law, military science & security	5.60%
Health sciences & social services	14.60%
Physical, mathematical, computer and life sciences	10.60%
Services	5.70%
Physical planning and construction	1.20%

Cosser 2003

This report by Cosser in 2003, shows that in 2002, a year later the profile of headcount enrolments by study area and field reveals a wide disparity between learner preferences and student enrolment. Table 4.2 depicts the 2002 enrolment profile.

Table 3.3.3 : First year headcount enrolment, by study area and field, 2002

Programme area	%
Natural and mathematical sciences	16.9
Engineering and other applied sciences	14.4
Health Sciences	5.3
Business and commerce	32
Education	3.2
Social sciences and applied humanities	19.3
Humanities	8.9
Field of study	%
Science, Engineering and Technology	36.6
Business and Commerce	32
Humanities	31.4

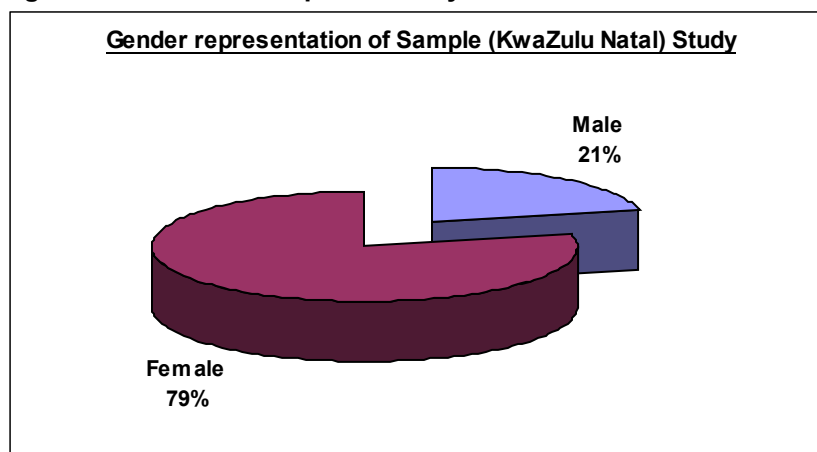
Cosser 2003

Fewer candidates are choosing other professions to education. This implies that with the current difficulty of attracting new candidates into teaching, South Africa will experience a shortage in the future.

In contrast to the findings of Cosser (2003), a survey conducted by the University of KwaZulu Natal, in collaboration with the University of Nottingham, an analysis of the future plans of newly qualified teachers in South Africa was undertaken.

It is common knowledge that South Africa among other countries in the region, has seen a lot of qualified professionals leaving for countries such as Australia, Britain, Canada, Saudi Arabia and other places of the world where skilled labour is in short supply. This has put a lot of strain on sectors such as health and education to a larger extent, and IT and Accounting to marginally lesser, but still very significant extents.

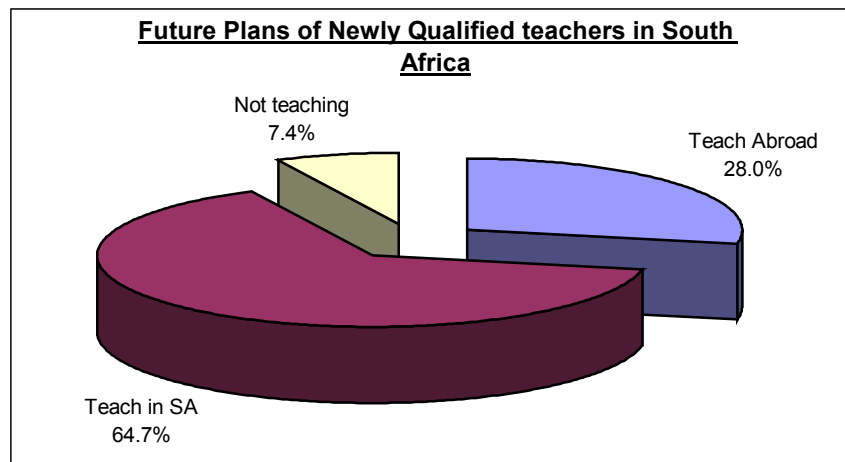
Figure: 3.3.4 : Gender split of Newly Qualified Teachers



Source: University of KwaZulu Natal – “Future plans of newly qualified teachers in South Africa”, 2005

The gender profile of the completing students (Newly qualified), compares favourably with that of the national average for public school teachers, where it is 71% / 29% on a female / male split. It is understandable for there to be slight variations, but these could probably have been closed considerably if the four provinces that did not participate in the survey had been available as well, thus increasing the sample size or just have a better response rate for the completed questionnaires.

Figure 3.3.5 : Future Plans of Newly Qualified Teachers in South Africa

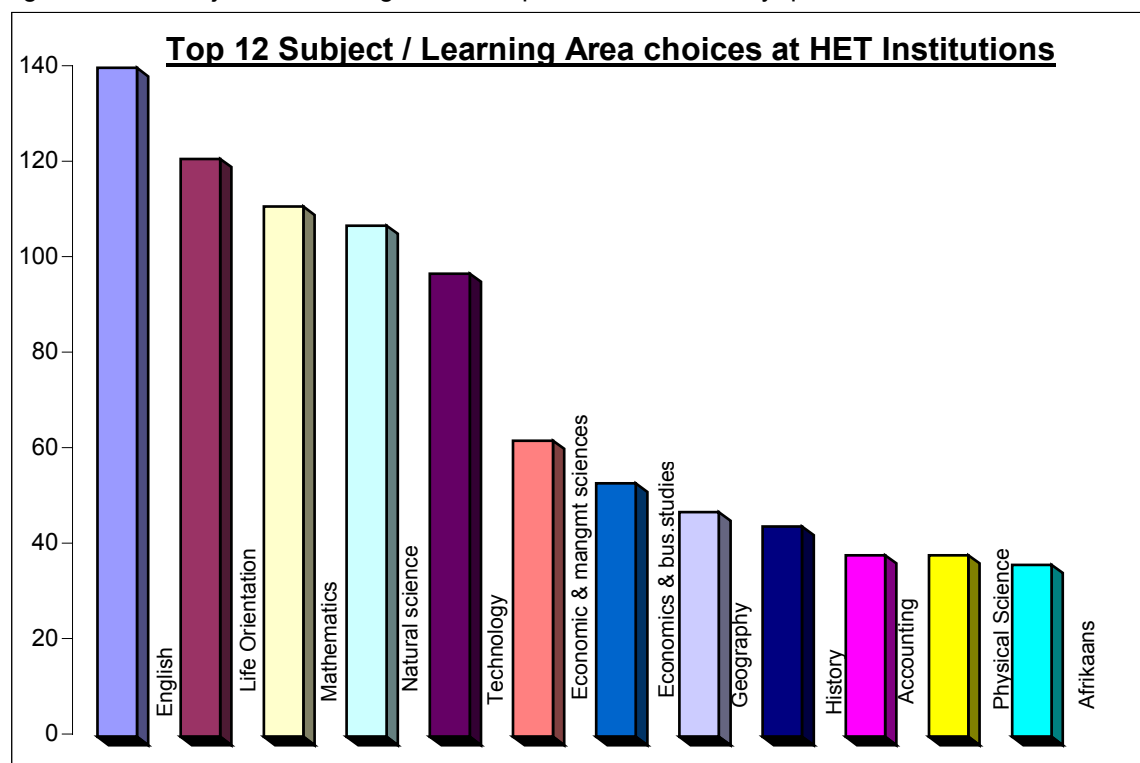


Source: University of KwaZulu Natal – “Future plans of newly qualified teachers in South Africa”, 2005

Most of the sample (41.9%) studied towards a B.Ed (Foundation and/or Intermediate) degree, 26.8% towards a B.Ed (Senior/ FET) degree and 28% towards a one year Post Graduate Certificate in Education (Senior/FET). Respondents were asked to indicate what subjects or learning areas they were qualified to teach.

Students studying towards a Senior Phase or FET qualification responded to the question on what subject areas they are specializing in, since Foundation/ Intermediate teachers do not specialise in particular subjects or Learning Areas.

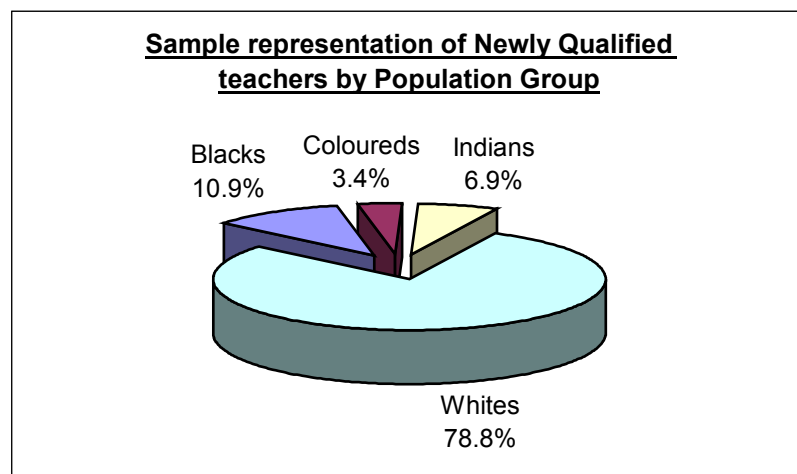
Figure 3.3.6 : Subjects / Learning Areas of specialisation of newly qualified teachers



Source: University of KwaZulu Natal – “Future plans of newly qualified teachers in South Africa”, 2005

The figures show that that in this sample, the subjects/Learning Areas that most teachers are qualified to teach are English, Mathematics, Natural Science, Life Orientation and Technology. These figures corroborate with the subjects identified by the South African government as ‘scarce’ subjects, so it appears that institutions are attempting to address these needs.

Figure 3.3.7 : Sample Representation of Newly Qualified teachers by Population Grouping



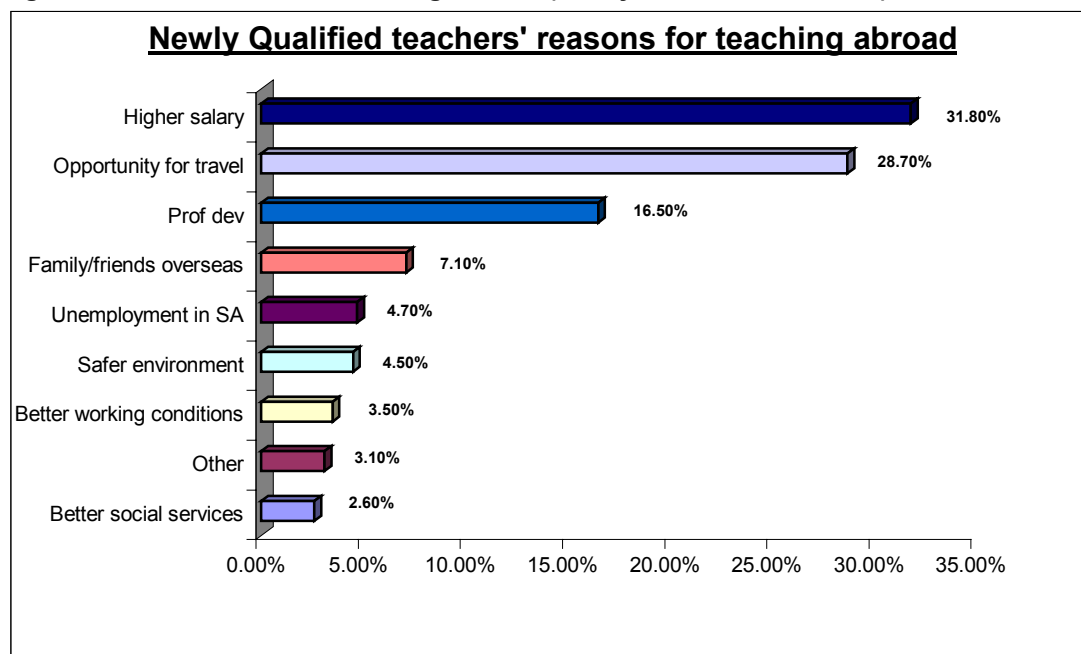
Source: University of KwaZulu Natal – “Future plans of newly qualified teachers in South Africa”, 2005

There are no accurate figures of the gender and ethnic composition of all student teachers, but it is estimated that about 70% of all students in initial teacher training are white and female (Wedekind 2004).

Thus it seems that the sample used in the survey at the University of KwaZulu Natal is fairly representative of the group as a whole, since 66% of the sample is white women. The mean age of the sample is 23.4 years with a minimum age of 20 years and a maximum age of 53 years. The overwhelming majority (91%) of students are South African, with 2.6% coming from Swaziland and 1.9% from Great Britain. Three quarters (74.4%) of the sample completed their own schooling in an urban area, 13.9% in a peri-urban/semi-rural area and 9.7% in a rural area.

These high percentages of students coming from the urban area would presuppose that they would be less willing to teach in rural areas were that to be offered them at some stage. It is probable too that these are the majority of students that would have a better grasp of subjects and learning areas like Mathematics, Science and technology. If this sample were to be taken as a representative sample of the teacher graduate population, then South Africa would be headed for serious trouble in about 3 to 4 years from now. A major intervention will have to be set in motion if the country is to avert a disaster by 2015 because of this trend.

Figure 3.3.8: Reasons For teaching abroad (Newly Qualified Teachers)



Source: University of KwaZulu Natal – “Future plans of newly qualified teachers in South Africa”, 2005

In summary, from all the evidence presented by different reports and reviews within South Africa, the following seems clear:

- ✓ There will be a difficult period when the estimated 12% of the existing teaching force seeks retirement, further aggravating the debate on teacher shortages within the next 5 to 10 years.
- ✓ With only about 5000 to 7000 effectual new graduates per year, representing less than 1% of the number required to maintain the current situation in the education sector, and a decreasing level of interest in taking teaching as a career, the possibility of the current younger age range teachers not being sufficient to adequately replace the older “soon-to-retire” group may become more reality than just possibility.
- ✓ The increasing trend of a faster “flight” out of the system by male teachers of different age groups will undoubtedly put pressure on some specific learning areas.
- ✓ If the current scenario prevailing in the system is left to continue unabated, there is no doubt that South Africa could be hit hard by a very real shortage of teachers to cater for meeting the EFA goal by 2015.

3.4. Geographic distribution

Distribution of educators is not even. Rural areas experience both qualitative and quantitative shortages. One of the difficult experienced by the Department of Education is recruiting new teachers to rural schools. This problem is exacerbated by the centralization of the Teacher Higher Education systems in urban areas. Most rural teacher candidates who train in these institutions never go back to their rural context instead they seek employment in the urban environments in which they trained. Teachers in rural contexts also find access to teacher development programmes difficult because of their geographic isolation.

If this trend continues rural schools will continue to experience teacher shortages. To address this problem the department of Education must engage in a recruitment drive amongst rural communities with new entrants obtaining bursaries and reconsider an induction year in rural areas⁴⁹. In addition, the department of education need of establishing satellite-training centres to encourage candidates to train in their own environment thereby reducing the immigration rate of these candidates to urban schools.

3.5. Teacher qualifications

Qualified teachers are amongst a school’s most valuable resources as they contribute towards ensuring quality education. However, teacher qualifications are only one of the input factors for quality education. Teacher’s competence is a combination of academic knowledge and methodology - academic skills are not enough to have a positive influence on the students’ results, and a broader teaching competence is also necessary.

⁴⁹ Ministerial report on rural education 2005

Each country chooses the required minimum qualifications to teach. In South Africa the Department of Education uses the Relevant Education Qualification Value (REQV) framework to evaluate and recognize the qualifications of educators.

Qualified teachers have a noticeable impact on the quality of education⁵⁰ In South Africa there is still a serious lack of educators in critical learning areas such as Mathematics, Science, and technology. These being as a result of past qualification structure, inadequate initial teacher education. But also qualitative shortages define in terms of ability to implement Curriculum 2005.

The current qualification framework is specified in the Norms and Standards for Educators (4 February 2000). Table 3.3 outlines the REQV levels showing the qualification credits assigned to different qualifications. The B.Ed degree has become established as one of the two basic professional qualifications⁵¹. 77% of South African teachers have a Diploma in Education in their main teaching assignment. The Department of Education (DoE) uses the Relevant Education Qualification Value (REQV) framework to evaluate and recognize the qualifications of educators.

The South African Qualifications framework for teachers and the general labour force, ensures that a standardization of qualification is achieved across all areas, thus ensuring the delivery of quality teaching will be better monitored to 2015 and beyond.

The 'Norms and standards for educators' drawn up in 1998, have shifted the minimum qualification requirements for all new teachers from REQV 13 to REQV 14. This means that educators in the system who have an REQV 13 level qualification will be considered qualified, but all new educators joining the teaching profession will be required to obtain the minimum of an REQV 14 qualification.

Teachers with a qualification level below REQV 13 are considered under qualified. The South African Education Department has employed initiatives to reduce levels of under qualifications in its teacher workforce. The total number of unqualified and under-qualified educators has been reduced significantly since 1994. The number of unqualified or under-qualified educators rose from 11% in 1975 to 17% in 1985 and then to 36% in 1994.

⁵⁰ Nilsson, 2003, 4

⁵¹ A National Framework for Teacher Education in South Africa June 2005

Table 3.3.9: Qualification Framework for Teachers/Educators

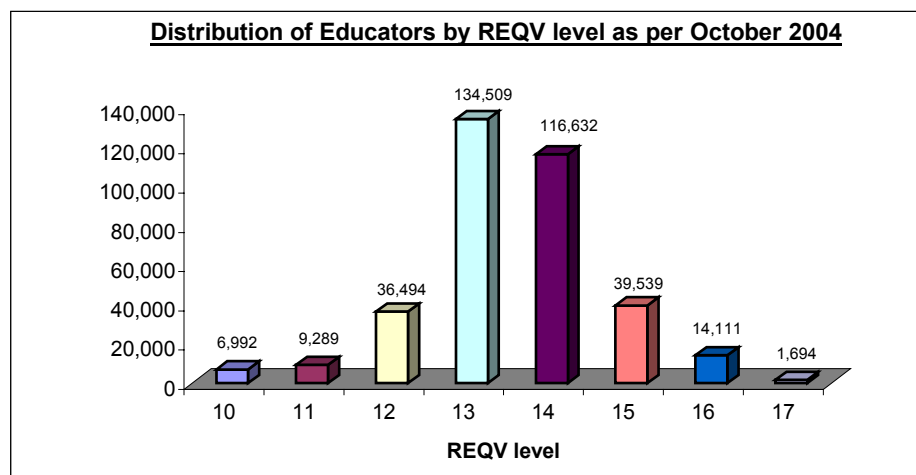
Levels	Credits	Qualification					REQV
8d	1200		Doctor Thesis				17
8c	1080						
8b	960						
8a	840		Master thesis				
7b	720	Master coursework			Postgraduate diploma		16
7a	600		B.Ed (Hons)	Advanced diploma			15
6b	480	B. degree B. tech	PGCE		B.Educ	Further diploma	14
6a	360	Licentiates N6 tech Diplomas First degrees			Diploma in Education		13
5b	240				Higher certificate		12
5a	120				Certificate in Education		11
4		FET certificates	Certificates in ABET ECD WE				10
3							9
2							8
1		GET certificates					7
HSRC 2002a: 79 - Norms and standards for educators (Technical Committee on the Revision of Norms and Standards for Educators, 1998:36).							

By 2000 however the proportion of unqualified or under-qualified educators had decreased significantly to 22% of the teaching force⁵². By 2001, there was a further drop in the number of unqualified and under-qualified educators to 18%. Further, according to the ELRC/HSRC study of 2005, in 004, unqualified or under qualified educators seems to have further declined to 8.3%⁵³. This was higher in primary (11%) than secondary (2.8%) schools, higher in rural (9%) than in urban schools (7.5%) higher among Coloured (13.8%) than Whites (2.2%) educators and above 10% in Northwest, Free State, Northern and Western Cape Provinces.

⁵² Perry and Arends 2003

⁵³ The HSRC 2002

Figure 3.3.10 : Distribution of Educators by REQV level.



Source: PERSAL, October 2004

There is a lack of educators with training qualification in Outcomes Based Education (OBE). Only new graduates would have received training in OBE and RNCS. Although training has been offered to these teachers to enable them to practice OBE in their classroom, critics have highlighted that the training they receive is inadequate and of low quality. The new curriculum introduced requires a different breed of an educator, trained in new skills. With the introduction of Curriculum 2005 educators faced new challenges that their previous training did not necessary prepare them for.

Teacher qualifications are however one of the input factors quality education. Teacher's competence is a combination of academic knowledge and methodology, Academic skills are not enough to have a positive influence on the students' results, a broader teaching competence is also necessary. There have been attempts to address both the qualification level of educators and improve the preparedness of educators to implement Curriculum 2005. This has been done through an array of professional development programmes and introduction of improved initial teacher Education. These attempts directly feed into improvement of quality of educators and therefore quality of education offered in our classrooms.

3.6. Professional development to address qualitative shortages

Continuing professional development initiatives have been put into place to address prevailing shortages and to facilitate professional growth and development that will ensure the provision of quality education in South African classrooms. These initiatives are detailed in The Norms and Standards for Educators, a foundation stone in the transformation of teaching in South African schools. They provide directions and guidelines for the pre-service and in-service development of professional and competent educators and emerged from a two year process of consultation, which involved intensive discussions with teacher unions, the South African Qualifications Authority, the Council on Higher Education, the Department of Labour, universities, technikons, and colleges of education.

South African teachers participate in a variety of formal and informal professional development activities on a continuing basis throughout their teaching careers. Traditional formats for these activities include half or full-day workshops and programmes sponsored by provincial education departments, school districts, professional associations, and other organizations; and courses taken outside the teacher education system, such as university extension, adult education or college courses.

In 2005, the Ministerial Committee on Teacher Education formulated a National Framework for Teacher Education, an overarching framework that will enable the development of a coherent teacher education system. It will also act as a guide to processes aimed at addressing particularly qualitative shortages in the teaching profession. The framework suggested the establishment of a dedicated Continuing Professional Teacher Development (CPTD) that will try to ensure that the substantial resources currently devoted to the professional development of teachers are effectively used in contributing to the lasting improvement of the quality of teaching, amongst other things. The suggested CPTD will take the shape of activities endorsed by SACE and will be allocated professional development points in line with the NQF⁵⁴.

In addition, both a Teacher Development section and an Educator Human Resource Planning Chief Directorate have been established in the Department of Education to address the crucial field of teacher and professional development. The focus has been on two areas: ongoing programme delivery, and longer-term planning and policy development. Each of these aspects has been addressed under the President's Education Initiative (PEI), which has involved:

- ✓ Initiating and assisting with teacher development programmes: to date over R250 million of donor funds has been channelled into the PEI teacher development programmes in provinces.
- ✓ Co-coordinating existing departmental programmes in support of policy developments, including Curriculum 2005, special needs education, and gender equity.
- ✓ Conducting an investigation into the development needs of teachers and effective means of addressing these needs. This has been reported on in *Getting Learning Right* (Johannesburg, 1999), and the Educator Development and Support (EDS) report.
- ✓ The establishment of a Sectoral Education and Training Authority (SETA) for Education.

In addition to what the Department of Education is doing, ACE and PDNE programmes have been in place to address qualitative shortages. These are aimed at addressing the gaps in teacher qualifications and improve knowledge capacity of the teachers. About 2000 educators in the field of Mathematics, Science and technology enrolled for these

⁵⁴ A National Framework for Teacher Education In South Africa, June 2005

programmes upgrading and improving their content knowledge and teaching skills. In addition, a number of projects are being undertaken by Non Government Organisations with regard to Mathematics and Science. These include:

- ✓ PROTEC, which has a number of existing teacher training projects for FET Maths, Science and English teachers in Limpopo, Northern Cape, Gauteng and the Free State. PROTEC currently trains intermediate phase Science and technology teachers.
- ✓ The Sediba project allows teachers to upgrade their qualifications in maths, Science and technology by doing an NPDE, HED or a B Ed with an accredited institution. It focuses on subject development of teachers at FET and first year university level.
- ✓ The Quality Learning Programme deals with Mathematics at GET and FET level but also does Science and school management.
- ✓ The Dinaledi project is a national project involving 102 schools across the country. It is an improvement program that includes maths and Science teacher training and resourcing of schools.
- ✓ The Thinthana project is a national project focusing on upgrading maths and Science provisioning at FET level. It was led in the North West by RADMASTE and engages maths and Science teachers in about six days of training on selected topics per year. It supplies schools with VCRs and TVs, maths and Science videos, Science kits and access to IT facilities set up in hub schools.

All the above projects are critical in the upgrading process of teacher candidates and teachers in the force, so that the quality of the teaching staff will not become a major stumbling block to the attainment of the 2015 goals. More training for teachers in specialist learning areas is imperative if South Africa is to meet its 2015 commitment. Furthermore, quality education means much more than improved training qualifications. Qualifications are only one aspect of quality learning - teacher experience, classroom curriculum; teaching and learning conditions including adequate financing of education, school management and school leadership are some of the other factors affecting the provision of quality education.

Teacher experience is gained over a period of time. Teachers need to stay longer in the profession to experience and hone their different teaching and learning strategies. However, at present, teaching has become a less attractive profession in South Africa and a lot of teachers either leave the profession or are thinking of leaving the profession.

4. TEACHER RETENTION IN SOUTH AFRICA

Teacher supply is reduced by a hemorrhage of teachers who leave the profession before retirement age and keeping teachers in the teaching profession has become a challenge. This certainly has also had an impact on the quality in the teaching force.

The teacher attrition rate is currently placed between 5 and 5.5% nationally. The gross attrition rate in the educator workforce has fluctuated in the period 1997- 2004. In 1997, the national rate was 6.9%, rising to 7% the following year before declining to 5.6% in 2002⁵⁵. The decline in attrition has also been attributed to the phasing out of the rationalization process, necessitated by the legacy of apartheid.

The natural attrition of educators is worsened by the fact that a significant number of South African teachers plan to leave teaching or hope to leave the teaching profession if a better offer comes along. Should those who suggest they would leave actually do so, the current teaching pool could decrease by as much as 25%. On average, those teachers who say they will remain in teaching as long as they are able or until they retire, suggest they would retire at age 61. This is generally below the expected average retirement age of 65. More than two out of five of the current teachers who say they would remain in teaching as long as they are able or until they retire say they plan on retiring within the next 10 years – the length of the current forecast addressed by this study.

South Africa has some time to prepare for the projected demands for additional teachers in upcoming years. And, despite the slowing growth of school-age population forecast over the next ten years, it is clear from projected figures and recent research studies that South Africa may face a serious problem with the supply of qualified teachers.

4.1. Who leaves or wants to leave teaching?

A recent study⁵⁶ reported that 55% of educators have considered leaving the education profession for various reasons discussed below.

In addition, the study report revealed that the proportion of educators who considered leaving their profession was higher in the urban provinces - namely in the Western Cape and Gauteng at 73% and 68% respectively. More teachers in urban areas 66% wanted to leave the profession when compared to 46% in the rural schools. This is borne out by the higher rate of attrition in urban schools than in rural schools. The lack of mobility and limited exposure to alternative opportunities in rural areas could be limiting thoughts of leaving the profession.

A 2004, Department of Education report⁵⁷, suggests that most teachers want to be posted to urban schools for both professional and personal reasons. The report argues that the extent

⁵⁵ The MTT report 2005

⁵⁶ HSRC 2005

⁵⁷ DoE 2004

of urban-rural divide in most countries creates enormous disincentives to being posted to rural schools. Teachers want to remain in urban cities for a variety of reasons: most notably the availability of good schooling for their own children; employment opportunities for spouses and other household members; the desire to maintain often close knit family and friendship networks; opportunities for further study; and poor working and living conditions in rural schools.

This implies that South Africa may experience shortages at two levels. First there is likely to be increased shortages of teachers in rural school due to difficulty in recruitment of educators willing to work in rural contexts. Secondly there is likely to be a shortage in urban schools with urban teachers leaving teaching to explore other career opportunities.

The 2004 study also revealed that more males considered leaving the profession than females, with 37% of men regretting their initial career choice to become a teacher. A higher proportion of Coloured and Indian/ Asian teachers thought about leaving the profession. This is believed to be the case because these groups have a greater success in the South African labour market. In addition, teachers who have obtained higher levels of qualifications were more likely to consider leaving their jobs. In fact, according to the study, a higher percentage of educators who had obtained at least a higher diploma or first degree, were unhappy about the lack of career development opportunities in education. In addition, Crouch and Perry (2001) observed that the number of educators leaving or joining as a percentage of all educators shows that the educators with REQV 14 were leaving at a faster rate than educators with REQV 13.

It also appears that young teachers are already leaving the profession in large numbers, raising concerns about the quality of education in the future and the impact this will have on teacher supply in 2015. Educators with between 5 – 26 years of teaching experience were more likely to consider other job opportunities. Most of these educators would typically be between 29 and 56 years of age. Their labour value could be higher due to the teaching and managerial experiences that they have acquired in the practicing of their profession. Their exit from the system contributes to both quantitative and qualitative shortages in education. In 1998/99 the age group of educators leaving, joining and staying in the profession suggested stability. The pattern of leaving suggested that those leaving the profession are mostly either ready for retirement, or are very young and possible simply giving the profession a try or joining while awaiting better prospects, leaving quickly upon finding them. This loss has to be understood in both qualitative and quantitative terms.

Attrition factors:

The decision to leave the profession has been recognized as one of the major causes for the teaching profession to experience such a high attrition rate. Evidence from several reports and studies seem to all concur that the average attrition rate is between 5.0 to 5.5% per annum. In real terms, this is between 17,000 to 22,000 and could even be up to 30,000 teachers per annum. The factors that contribute to this have been discussed at length in earlier sections. In this section we recap on some of these reasons and bring the realization of the implications for 2015 to the fore.

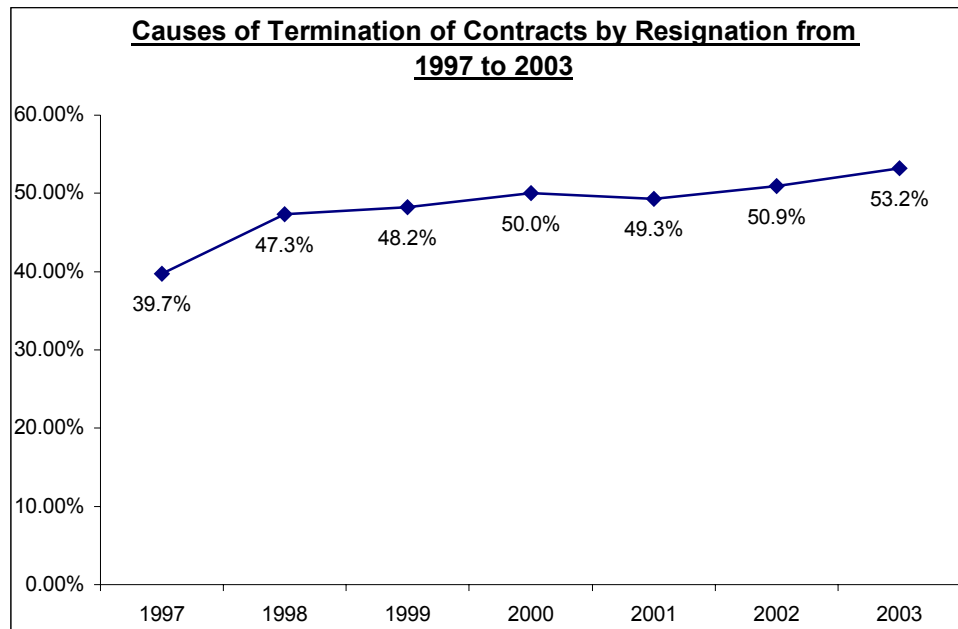
Data available from the Persal database at National Treasury and from the EMIS database collected via the ASS (Annual School Survey), has four broad categories of reasons for termination that seem to be on the increase; Other forms of leaving the system are manageable and seem to be more administrative than complete losses to the system. Some of these other forms referred to are Transfers, Dismissals for disciplinary reasons, and Severance packages. The four that seem to be on the increase and could spell trouble for the country's ability to fulfill its 2015 obligations, are:

- Resignations
- Retirements
- Medical reasons and
- Death

Technically, a newly qualified teacher who has not been placed within a school and given an assignment to teach is not affecting the attrition rate if that teacher leaves before placement, or immediately after graduation. What that teacher is doing is limiting the size of the pool of available teachers for deployment and placement.

Figures 4.1(a) to 4.1(d) below, show increases in the percentage numbers of resignations over the period 1997 to 2003. They also show an increase in the percentage rate of death. Whilst in 1997 only 39.7% educators resigned, in 2003 this figure stood at 53.20%. This does indicate an increase in the number of educators exiting the system before retirement. If the trend increases and South Africa continues to lose educators at such a rate due to resignations and considering other factors impacting on teacher supply in South Africa, it is clear that South Africa will experience a shortage of educators in the near future. To address this drainage of educators the Department of Education needs to understand the reasons why teachers leave the system. Whilst other forms of contractual termination were showing very sharp declines, (Transfers from 5.1% in 1997 to 0.4% in 2003; Severance packages, plummeted from 34.9% to 0.4% over the same period and Dismissals dropped from 8.4% to 3.5% during that period), these four areas or causes of termination shown in the figures above are on the increase.

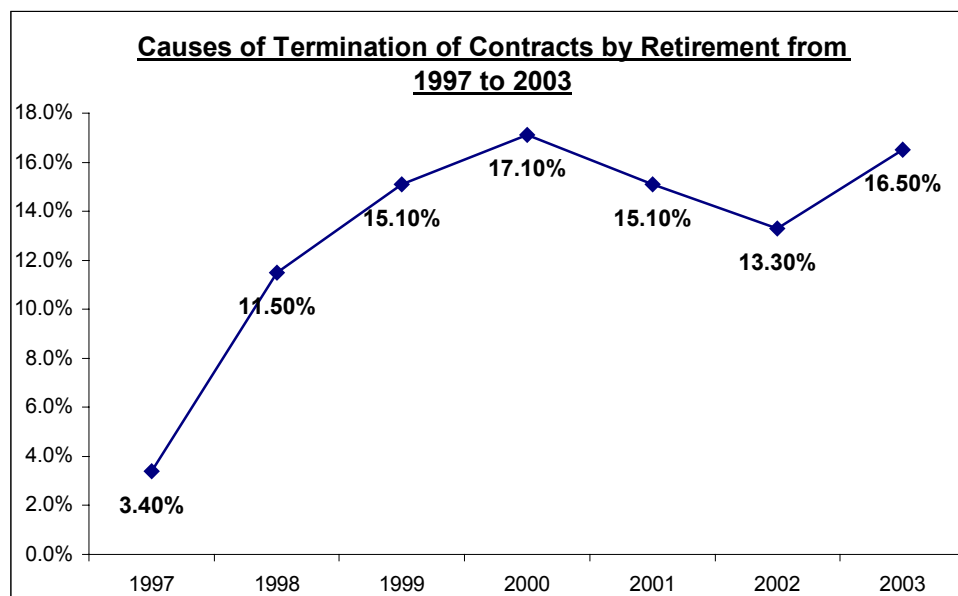
Fig 4.1 (a). Causes of Termination: Resignation



MTT Study 2005

By 2003 resignations had accounted for over 50% of all educator termination. This however represents only 5% of the teachers within the system that are exiting the profession.

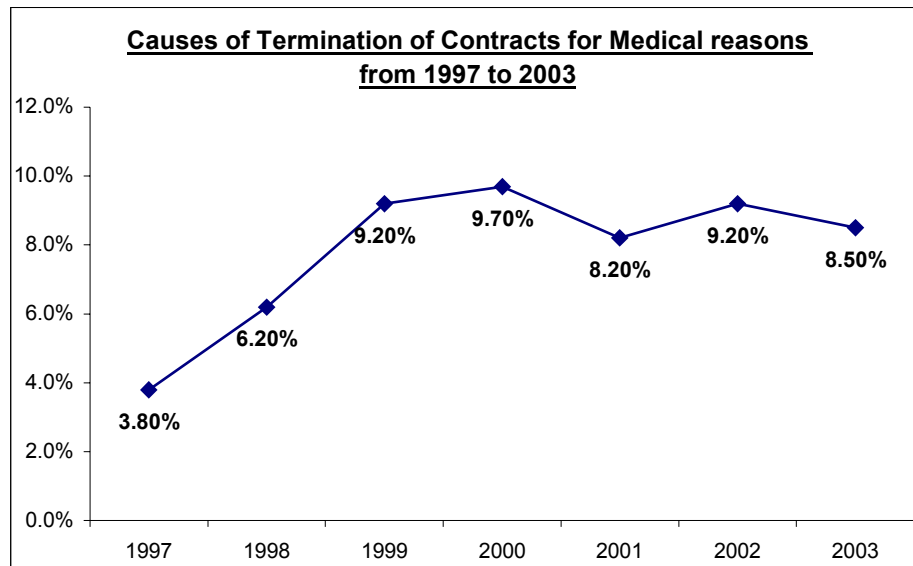
Fig 4.1 (b). Causes of Termination: Retirement



MTT Study 2005

The proportion of terminations due to medical reasons grew from 3.8% to 8.5% over the same period. (See Figure 4.1 (c))

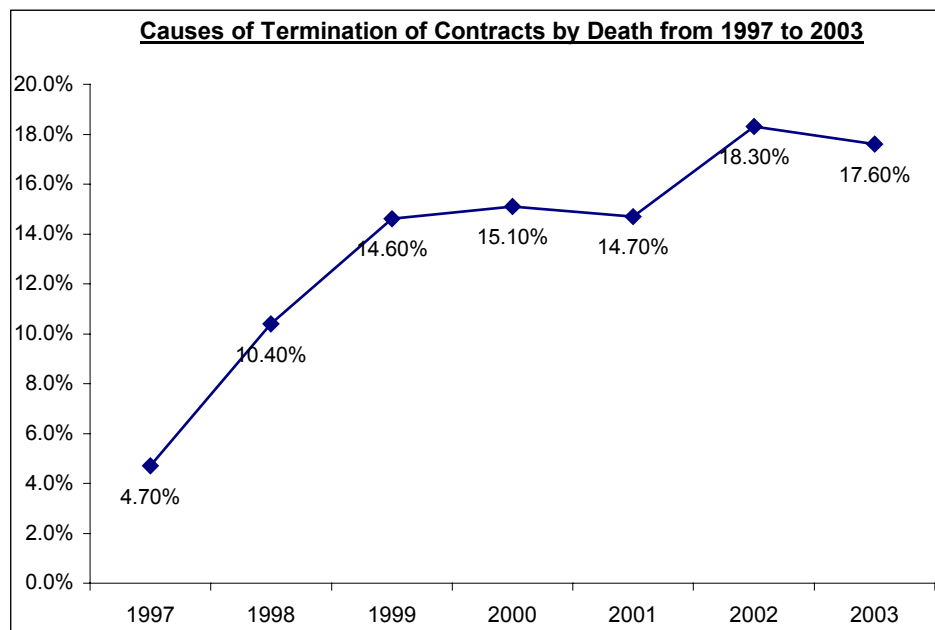
Fig 4.1(c). Causes of Termination: Medical Reasons



Source : MTT Study 2005

Figure 4.1(d) shows that the relative proportion of termination accounted for by death rose from 4.7% in 1997 to 17.6% in 2003

Fig 4.1(d). Causes of Termination: Death



Source: MTT Study 2005

. The implications for 2015 are such that with the exception of making adequate provisions for the replacement of teachers that terminate as a result of death, all other factors

(Resignation, Retirement and Medical) will have to be given priority if South Africa is to have enough teachers to meet its Education for All obligations, and its Constitutional mandate.

In order for government to be able to do this effectively, a clearer understanding of why teachers leave or consider leaving the profession.

4.2. *Reasons why teachers leave or consider leaving the teaching profession*

As discussed above, a considerable number of those who do decide to join the teaching profession leave for other jobs long before reaching retirement age. Factors contributing to these high rates of teacher attrition include illness and bottlenecks in teacher preparation systems. A variety of unattractive conditions of service also play a strong role in limiting teacher supply. These include perceived low salary, arbitrary teacher deployment systems, unattractive work locations, unprofessional treatment of teachers, lack of professional development opportunities, and insufficient supportive supervision. Another strong pushing factor is the low opinion that society has of teaching. Teaching is considered a low-status career and well-qualified teachers have increasing alternative employment opportunities in other sectors of the economy.

Some of the other reasons for leaving the teaching professions cited by teachers during interviews (Vumara, 2005) include:

- ✓ Disintegration of discipline (thus causing unfavourable working conditions).
- ✓ Lack of facilities for teaching – especially subjects such as Science and technology.
- ✓ Severe overcrowding. This in spite of a generally good National average Learner - Teacher ratio.
- ✓ Lack of adequate incentives.
- ✓ Poor parental participation at all levels: School governance and disciplinary actions on their children.
- ✓ Policy overload, leading to dissatisfaction with time allocation and making working conditions unbearable through the increase in administrative work.
- ✓ Role conflict. Teachers claim they have to adapt and adopt a multitude of roles depending on circumstances presented at school. These include counseling, teaching, *locus-in-parentis*, security personnel and sometimes even as midwives.
- ✓ Blatant favouritism and nepotism at school governance levels.

4.3. *Teaching and learning conditions*

When employees are not satisfied with their working conditions they are more likely to seek better teaching and learning conditions or opt out altogether. Teaching and learning conditions have a direct effect on teacher levels of job satisfaction. There are some general challenges posed by conditions in which the South African educator operates, some of which are contextually defined. The effect of learning and teaching conditions has been overlooked to a large extent, but the implications are enormous. For EFA, the numbers of teachers

leaving due to conditions of learning and teaching can make or break the attainment of that objective by the country.

Learner-Educator Ratios and Actual Average Class Sizes

The level of provisioning in respect of education human resources is generally expressed as learner-educator ratio. The allocation of funds by the country's National Treasury to provinces is largely aimed at ensuring that certain learner-educator ratios apply in schools. However, learner-educator ratios are often confused with class size whilst it is a fact that class sizes are generally considerably higher than the prevailing learner-educator ratio. A class size is not only a function of how many learners to a school. It is also dependent on the numbers of physical infrastructure units, such as classrooms there are accommodating how many teachers and subjects. This study, found within some areas, children taking turns to learn under trees and sometimes sharing the teachers' staff-room as a make-shift classroom. In other cases, two complete classes would be housed within one physical class building and both teachers teaching on opposite ends of the classroom. This erodes the semblance of quality teaching and learners that is supposed to have a bearing of the children.

The learner-educator ratios that applied in provinces over 2002 – 2003 periods are indicated in table 4.1.

Table 4.1. Learner-Educator Ratios by Province

Province	Learners		Educators		Schools		L:E Ratio	
	2002	2003	2002	2003	2002	2003	2002	2003
E CAPE	2 072 054	2 116 426	65 355	64 865	6 191	6 165	31.7	32.6
F STATE	705 368	696 155	22 517	22 596	2 343	2 186	31.3	30.8
GAUTEN	1 617 017	1661 817	52 601	53 544	2 331	2 345	30.7	31.0
KZN	2 729 834	2 783 051	74 500	77 829	5 722	5 788	36.6	35.8
LIMPOPO	1 839 079	1816852	56263	54298	4763	4251	32.7	33.5
MPU'LAN	914 353	914 739	25 141	25 515	1 934	1 926	36.4	35.9
N WEST	897 342	890 605	30 035	30 319	2 292	2 253	29.9	29.4
N CAPE	196 731	202 104	6 484	6 216	476	457	30.3	32.5
W CAPE	945 239	956 836	27 259	27 248	1 595	1 597	34.7	35.1
S AFRICA	11 917 017	12 038 585	360 155	362 430	27 647	26 968	33.1	33.2

DoE SNAP Survey, 2002

Except for the Free State, KwaZulu Natal and Mpumalanga provinces, most of the other provinces saw a small increase in the Learner-Educator ratios since 2002. This reasons for this increase have not been particularly established. There could be a number of causes, including a slight increase over the years 2002 and 2003 in learner numbers that were not catered for by an increase in educators.

The allocation of available posts in a province takes place in terms of the post-provisioning model (PPM). This model takes into account all factors that impact on a school's post provisioning needs and then distributes the available posts to a school in accordance with

their relative and identified needs. One of the factors that the model takes into account is the relative poverty level of the school.

School Security and Violence

Security in school is an issue in all urban centres, particularly in neighbourhoods most exposed to conditions that would foster violence - poverty, prostitution, drugs, delinquency, etc. For some years now, school governing bodies along with such institutions as community organisations, associations for young people, the national and provincial educational authorities have been multiplying their efforts to identify the forms that violence takes within schools in order to develop prevention programmes aimed at teachers, children, adolescents and parents.

For several years now, the National and Provincial educational authorities as well as school and community organisations have been closely monitoring the development of violence in schools and have put measures in place to counter it. The complete eradication of violence in schools is a determined attempt by the authorities to quell any violence that would effectively cause some learners to stay away from school. This is an indirect infringement on the rights of the individual learner, to have free and unfettered access to quality schooling.

Statutory Working Hours versus Estimates of Actual Hours of Total Teaching

Currently educators in South Africa are expected to be at school for 1800 hours per annum. This translates into seven hours per day that should be spread over 257 days, but is commonly compressed into 200 days per annum. Educators are also expected to perform a variety of duties in school, extracurricular activities and utilize up to 80 hours professional development time per annum.

Teacher workload

According to the Education Labour Relations Council (ELRC) another possible causes of educator attrition is work overload. Educators are often perceived to have favourable working hours as well as the benefits of long school holidays. However, as letters from educators to the media reveal, in addition to tutoring, educators also have to be available after hours and over weekends for extramural activities such as sport, parents' evenings, school functions and training sessions. There is also the time spent at home on preparations, marking and paperwork⁵⁸.

⁵⁸ ELRC, 2005; Factors Determining Educator Supply and Demand in South African Public Schools

Teacher workload has become a highly contentious issue internationally, even more so in the last ten years. Internationally, the research focused on educator workload is connected with teacher stress and burnout. Teacher stress has been linked to greater demands being made on teachers and changing roles of educational personnel in the context of educational restructuring - a phenomenon characterizing the educational reform efforts of the last two decades⁵⁹.

While there is some literature in the international context on workload, limited comparable research conducted on the South African context reveals clear exception by teachers on their increased workload due to policy changes, new expectations and accountability requirements. These factors have increased the workload and introduced the threat of intensification⁶⁰.

The causes of increased workload have been cited⁶¹ as:

- Administrative tasks as a result of different curricula introduced
- Location, (Rural, Urban, Semi-rural) The nature of responsibilities differs considerably
- Historical issues of the school and the areas. Hours spent at the school as a result of historical differences. What occupies teacher time the most is also influenced by the historical aspect.
- School size and class sizes: In relation to Overcrowding, shortages, and staff increases in administrative tasks
- Gender matters: Gender based differences on what teachers do.
- Phase Matters: Different phases spend different amounts of time on particular activities, sometimes caused by the nature of the Learning Areas taught.
- Effect of OBE: Varying reactions to the requirements of OBE and the presence or absence of teaching and learning resources.
- The effect of the requirements of the implementation of the Integrated Quality Management System (IQMS).

4.4. Teacher job satisfaction and morale

Low levels of job satisfaction and low morale are also a problem among the South African teaching fraternity. Issues that have affected teacher morale are: HIV and AIDS death of learners and colleagues, challenges of the new curriculum and the perceived low regard by the rest of society for educators.

According to a Department of Education report, 2004, it is widely argued that the status of teachers in most countries, both developed and developing has declined appreciable during recent decades. This has had a psychological impact on educators and hasn't only led to

⁵⁹ Vandenberghe and Huberman, 1999

⁶⁰ Stoffels, (2004) and Jansen (1999)

⁶¹ Linda Chisholm et al. "Educator Workload in South Africa" – Draft report prepared for the ELRC, (HSRC, 2005)

teachers leaving the profession for perceived better jobs but also a decline in the interest to join the profession.

The implications for 2015 under conditions of low teacher morale and low job satisfaction, is that, even if teachers are in the classrooms in the flesh, they may not have the capacity nor the interest to put the full professional backing behind ensuring that standards are maintained and quality of teaching is sustained. The Constitution of South Africa, The Freedom Charter and the Dakar Declaration, guarantee children to access to quality education for all by 2015.

In a study conducted by NAPTOSA in 2002, reasons cited as opinions of the groups interviewed, for low teacher morale included:

- Unsatisfactory salary packages.
- Inadequate financial compensation for workload and responsibility.
- Salaries not keeping up with the inflation.
- Salary packages not market related.
- Inadequate remuneration for qualifications.
- Insufficient perks such as housing subsidies, travel allowances.
- Unsatisfactory working conditions. Teachers in this study expressed a need for renovations and repairs of present facilities, need for new buildings.
- HIV/AIDS is impacting on the emotional status of educators. Teacher morale is low where impact is high.

Studies analysed for this review revealed that teachers believe their own morale to be largely determined by their quality of life within the school; rating factors such as good relations with pupils and helping pupils to achieve as very important. Interestingly, when asked to name those factors that they felt could have a positive effect on the morale of the profession, teachers' responses largely related to factors external to the process of teaching itself - more positive portrayal of the teaching profession by the media, increased pay, better conditions and less pressure.

It seems that to improve both the morale of individual teachers and the ethos of the profession as a whole, a range of measures are needed, addressing both experiences integral to the work of teaching and factors linked to the structural and social context within which that work is carried out. The main factor found to contribute to the job satisfaction of teachers is working with children. Additional factors included developing warm, personal relationships with pupils, the intellectual challenge of teaching and autonomy and independence. For Heads of Department, the main factors contributing to job satisfaction include their relationships with others, having responsibility and the success of their school.

In contrast, teachers viewed job dissatisfaction as principally contributed to by work overload, poor pay and perceptions of how teachers are viewed by society. As with teachers, administrators and/or Heads cite work overload as a major factor contributing to job dissatisfaction. Variations have been found in the job satisfaction levels of teachers, depending on certain individual and school characteristics. Gender differences include female teachers having higher overall higher job satisfaction than their male colleagues. They are also more satisfied than men with the curriculum and the recognition they receive

for their efforts. Male teachers are more satisfied than women with their influence over school policies and practices. Primary teachers are less satisfied than secondary teachers with the balance between their work and personal lives, whereas secondary teachers are less satisfied with their influence over school policies. Teachers in rural areas report higher levels of job satisfaction than those in urban schools.

4.5. Remuneration and material incentives

Many advocate substantial salary increases as a means of attracting and retaining talented teachers in the school system and of encouraging harder work by current teachers. Salary policies are also cited as important for offsetting changes in demands in competing occupations and for dealing with unattractive working conditions in particular sets of schools⁶².

In an attempt at dealing with some of the working conditions discussed in this section, the department has embarked on several policies. The current Department of Education budget 2005, allocates an additional R6.9 billion to improve the salaries of teachers: R2.7 billion is for the 2004/5 carry through costs of existing agreements; R4.2 billion to be used for expanding pay progression, for performance rewards, and for targeted incentives. Attention is also be given to creating career paths for experienced educators and improved conditions for school principals. On top of this Government has earmarked funds for the recapitalisation of school infrastructure, equipment and resources.

Teachers leaving the profession to seek better salary packages, impact on both qualitative and quantitative shortages. The profession loses young blood that could otherwise bring in new thinking, innovativeness and drive that would have grown and bettered the skills within the profession. The profession also loses skills in critical learning areas such as Mathematics, Science and technology as these educators are taken up and absorbed in other career choices.

The Department of Education is attempting to introduce a range of incentives designed to encourage educators to stay on in the profession. Financial incentives in the form of service bonuses at 10 years, 15 years and 20 years of experience and more may encourage the educators to stay longer in the profession.

⁶² OECD 2002, Attracting, Developing and retaining Effective teachers

5. IMPLICATIONS OF HIV/AIDS FOR TEACHER SUPPLY AND DEMAND IN 2015

A recent study ⁶³ suggests “the proportion of HIV positive educators with a CD cell count of 22% is higher than that reported in other population based studies conducted in sub-Saharan Africa”. The study also suggests that HIV prevalence among educators was higher for those aged 25 – 34 years (21%), with women having a higher HIV prevalence. The latter reflects the fact that women are generally more vulnerable to HIV infection because of their biological makeup, as well as their low socio-economic status. In addition, the study found that Africans had a prevalence of 16.3%, compared to Whites, Coloureds and Indians who had a prevalence of less than 1%. Educators who had a low socio-economic status had a higher prevalence.

The study also found that educators residing in rural areas and those working in rural schools had higher HIV prevalence than educators residing in urban areas and teaching in urban schools. It also revealed that educators employed in KwaZulu Natal and Mpumalanga had the highest HIV prevalence when compared with others. The highest provincial mortality rate was in KwaZulu Natal among 31-35 year old educators at 1.18%⁶⁴.

At the same time, the pandemic greatly reduces the capacity of the system by increasing teacher absenteeism. It also saps the system's energy by imposing additional demands on teachers as they provide support for ill students and students with ill family members. At present there is no official procedure for terminating the services of African teachers who are HIV/AIDS positive and who should be pensioned off for medical reasons. HIV/AIDS will also increase the attrition rate among educators because of the loss of skills in the broader labour market, which could increase competition for teachers. Management capacity is also likely to be affected.

Medical aid costs, and the ability to maintain or extend cover, are expected to be significantly affected by HIV/AIDS. The current structure of the Government Employees Pension Fund makes it unlikely that it will face major cost increases due to HIV/AIDS death and disability. However, health and other benefits will have a key role to play in reducing impacts on employees, system function and employees' dependants. Stakeholders need to review whether current benefits address priority objectives in an era of HIV/AIDS.

Research reports project that AIDS will soon become the leading cause of deaths among teachers. Up to 3.5% of teachers could die from AIDS annually by 2010. This rate of mortality

⁶³ ELRC

⁶⁴ MTT 2005

due to AIDS is similar to that experienced by teachers in other neighbouring or close proximity countries with established AIDS epidemics. Clearly these high levels of AIDS-related illness and death among employees could have a significant impact on the education sector. Performance of remote schools or those with small staff complements, such as farm schools, will particularly be vulnerable, as will institutions with high workloads and less reserve capacity to spread loads.

A major factor in the projected demand for educators is the assumptions driving the prevalence of HIV/AIDS among educators and the death rate of educators from HIV/AIDS⁶⁵. However, the challenge facing research around the impact of HIV/AIDS on teachers is that HIV/AIDS death cases are not easily quantifiable. Instead, assumptions are fuelled by the knowledge that teachers are known to be ill, increasingly absent from work and dying out of the teaching service. HIV/AIDS is rarely named as the reason⁶⁶.

Despite these research concerns, it has become clear that HIV/AIDS contributes to the quantitative shortages that exist in the teaching profession. The death of teachers and students teachers, impacts on both the supply of and the demand for teachers⁶⁷.

The combination of teachers leaving the profession in droves and of teachers dying or leaving the profession due to HIV/AIDS could lead to both qualitative and quantitative shortages if not assuaged. The HIV/AIDS pandemic could prove to be one of the biggest single contributors of a mass shortage of teachers if left to its own course.

Despite the overwhelming evidence of the impact of HIV/AIDS on the life, longevity of service of teachers and the general well-being of teachers within the profession due to the scourge of HIV/AIDS, it is comforting to note that governments, including the government of South Africa, have taken up the fight against HIV/AIDS and its debilitating effects in an effort to try and ensure that it does not prevent the country meeting its 2015 obligation. What is worthy of note as well is the fact that in both the Jomtien meeting in 1990 and the Dakar Conference in 2000, the impact of HIV/AIDS was not given the prominence it was supposed to have in the minds of the government representatives, yet, it has one of the greatest single effects on teacher supply and demand.

⁶⁵ Crouch and Perry, 2003

⁶⁶ **Coombe C; Mitigating The Impact of HIV/AIDS on Education supply, Demand and Quality.** www.Unicef-icdc.org/research/ESP/aids/chapter12.pdf

⁶⁷ Hall 2002

6. IMPROVING TEACHER SUPPLY

Improving our teacher supply is one way of mitigating the effects of the losses described in the preceding sections. South Africa faces challenges with their pool of available educators. One of these challenges is that of attracting new educators into the teaching profession and another is the challenge of how to retain those already in the system. At present South Africa is not producing enough teachers to balance out the effects of annual attrition. In this section we explore the approaches employed to attract new teacher candidates and those used to retain the educators in the profession. We look at how these impact on the teacher supply at present and for the future and how these could be improved to ensure that we have an adequate supply of educators for 2015.

The decline in enrolment has affected the number of education graduates produced by HE institutions. In addition a considerable number of new teachers produced by university teacher preparation programmes in South Africa each year never make it into the country's public school classrooms. Private schools are a favoured option for some of these graduating individuals because of the perceived offerings and financial incentives. Business and industry recruit teachers as well, especially those in the areas of mathematics, science and computer science.

Another challenge facing the teaching profession in South Africa is the international migration of teachers. Studies on the demand for and supply of educators in the South African Public Education system show that the supply of educators is also affected by high level of migration in this category of the population⁶⁸. Overseas countries such as the United Kingdom, Canada, Australia and New Zealand have recruited a high number of South African educators mainly because for greener pastures- better pay and living conditions. The majority of the educators emigrating have been found to be mostly the experienced ones, particularly those coming from previously advantaged and white schools who have the skills for teaching mathematics and science subjects. These specialist subject teachers are also the hardest to replace, making it hard er o meet EFA goals if teachers with scarce skills are not replaced.

In order to improve the pool of new teachers there's a need to understand the profile of a young person who chooses teaching as a career or as a path to follow. This will inform recruitment strategies that are defined by a target group.

⁶⁸ HSRC 2005

6.1 Teacher candidates: Who chooses teaching

The present demographic profile of students who take teaching is a cause for concern with implications for the provision of new teachers in traditionally disadvantaged reaches of the schooling system⁶⁹. The profile of existing teacher candidates reveals that the students intending to go into teaching are more likely to be female, young, be studying English rather than science, engineering and are white. There are a few black student teachers particularly in the foundation phase. The 'surprising factor' is that 'white participation (has) increased'⁷⁰. The speculation is that reasons for this may be linked on the one hand to the fact that the formal economy is opening up at a faster rate for Africans, relative opportunities for whites have waned faster and on the other to the increase in teacher posts created by school governing bodies⁷¹. This has been clearly demonstrated in surveys such as that undertaken at the University of KwaZulu Natal. There 33% of the sample group already had jobs lined up before the completion of their teaching qualifications. Three-quarters of these posts were ex-Model C School Governing body appointments.

White students entering the profession tend to have more successful academic results in their matriculation examinations, and most are committed to becoming educators and have chosen teaching as their first option. However there is a view that teaching for these students may be a means to gain overseas employment rather than serving South African education system. The majority of white student educators do not experience or intend teaching in township (or rural) schools. For most their teaching qualification is their ticket to international travel and employment. In fact although the data tracking undergraduate enrolment in teacher preparation programmes is patchy, there is evidence suggesting that once they become teachers, many individuals are lured away immediately and others leave in their early years of teaching at increasingly alarming rates.

Business and industry recruit teachers as well, especially those in the areas of mathematics, science and computer science. For those new teacher who choose to work their appointments at schools are usually at the mercy of school governing bodies that make recommendations to the provincial authorities about the teacher they would prefer to teach within their school. This could mean working with limited benefits and as a temporary teacher for sometimes long periods. When an opportunity for a permanent employment with better benefits comes their way, these educators will leave their current employment with no second thought.

The stark implication of this is an increased shortage of black teachers, particularly in foundation phase. White students are not known for having a particular interest in teaching in

⁶⁹ A National Framework for Teacher Education in South Africa, 2005

⁷⁰ Crouch and Perry 2003

⁷¹ Crouch and Perry 2003

black schools in particular. But even if they were interested, they would be constrained by an inability to teach in the mother tongue, as is the requirement in the foundation phase.

Strategies to attract black teacher candidates particularly to specialize in foundation phase must be put in place to ensure a continual supply of these teachers.

6.2. Number of Students enrolled for a teacher qualification

To avert projected teacher shortages the number of students enrolling for teacher education must be increased. The incorporation of teacher education colleges into universities has significant implications for improving the quality of teacher education in South Africa. Since many institutions are still grappling with the changes at an institutional level, these implications will probably take some time to become visible.

The number of students enrolled in the Initial Teacher Training (ITT) courses sustains the flow of new entrants into the teaching profession. NFTE⁷² report noted that the declining number of teachers entering the teaching profession in recent years has been a concern to many especially higher education institutions that have seen a drop in enrolment of first year entry students into the undergraduate B.Ed degree. Similarly, there has been a decrease in the demand for teacher training with an observed steady decline in the enrolment of initial teacher education over the past five years except for 2004 where an improvement in the number of enrolments was noted⁷³.

According to some of the more current research from 1999 to 2003 there has been an overall steady decline in student-educators enrolment by approximately 24.3%. In 1997 there were 142 169 students enrolled for teacher preparation programmes in South Africa. The student enrolment dropped to 130 000 in 1998; and of the 107 000 students enrolled at universities in 2001, 20 321 were enrolled as full-time students. The number of education graduates peaked at 35 628 in 1999 and drastically declined to 22 958 in 2002 and increased again to 25 308 in 2003. In 2003, 81.1% of the education graduates were African and 11.3% were Whites.

The decline in enrolment is significant among Africans⁷⁴. The Ministerial Committee on Teacher Education (2005) found that the majority of students enrolled in the country's tertiary institutions were predominantly female and white. The ELRC report indicates that African students are generally not choosing teaching as a profession. This is because of the perceived status educators of educators, learners' observations of teaching while they were at school coupled with an increasing availability of other career options to choose from. Public perception of teachers and the schooling system are also additional discouraging factors.

⁷² National Framework for Educators, 2005

⁷³ HSRC 2005

⁷⁴ HSRC 2005

Traditionally, the South African public has respected the role of teachers and this regard is deeply rooted in historical circumstances. Even when teachers did not benefit from good salaries there was regard for their scholarship, the nature of their work and their roles in the community. This has significantly changed. Levels of trust in teachers and the schooling system have been dented. The financial status of teachers has been greatly reduced when compared with other professions. The public's level of respect for teachers is likely to affect the attractiveness of the teaching profession and the inherent quality of new teachers.

Furthermore, student's own personal experiences of teachers and teaching have left the impression that the task entails onerous responsibility and duties. Learners experienced firsthand the downsizing/ rationalization of the teaching force during their secondary school years which also included teachers being re deployed or made redundant. This left the perception that the teaching career was not stable. Teachers themselves often discourage learners from becoming teachers stressing their own experiences as disadvantages and point learners to different career options⁷⁵. New opportunities for career choices beyond teaching are now more freely available for those students who have the necessary university entry qualification.

If there is to be equilibrium in the supply and demand for educators then the number of educators leaving teaching needs to be balanced by the number entering teaching. Forecast of teacher demand and supply suggest a large and looming imbalance between supply and demand arising from inability to attract enough candidates into teacher education among other factors. These factors coupled with demographic changes and the impact of HIV/ AIDS, have created a situation where future demands are likely to be many times greater than the current supply.⁷⁶. This situation warrants urgent intervention on the part of the Higher Education Sector and the Department of Education.

As it stands if not addressed South Africa will not have enough educators to meet the demand for the provision of quality education in 2015. The numbers of new candidates have further been reduced as a result of the impact of changes in teacher education.

6.3. Initial teacher education

The context of initial teacher training plays a significant role in the quest to attract more candidates into teacher education. However the state of teacher education in South African has been cited as one of the factors contributing to the decline of new teacher education candidate-numbers.

⁷⁵ Framework on teacher Education

⁷⁶ Crouch and Perry, 2003

6.3.1. Reforms in teacher training

The reforms in the teacher education sector have brought in new set of challenges to the supply and demand of educators in South Africa. The field of teacher training has experienced a certain amount of instability over the past decade. The policy of rationalising and restructuring teacher training colleges inherited from the former education departments culminated in the incorporation of remaining teacher colleges into universities in 2000. In 1994 there were approximately 150 public institutions providing teacher education to approximately 200 000 students, 80 000 of which were in Colleges of Education⁷⁷.

The post apartheid DoE aimed to address fragmentation between historically advantaged and historically disadvantaged institutions; universities, technikons and colleges; English and Afrikaans speaking institutions; high and low status institutions and residential and distance institutions.⁷⁸ Until the time of change, teacher education was the shared function of national and provincial government⁷⁹. University teacher education providers fell within the remit of the national Ministry of Education (specifically the higher education branch), while colleges of education were under provincial control.

At present, there are no colleges of education in South Africa; instead there are 24 Higher Education Institutions involved in educator education. Critics of reforms in teacher education contend that Teacher Education has become a Higher Education stepchild. While the decision to place all teacher education in university and technikons faculties of education can be easily justified on the basis of cost and quality, little thought seems to have been given to the specific needs of teacher education. Higher Education Institutions are geared primarily to teach pure knowledge to a largely full-time, undergraduate student body, and to develop pure and, sometimes, applied research. They are not primarily interested in the time-consuming and often practical, school-located activities of ensuring sound professional education for large numbers of students. Nor do they teach large numbers of mature-aged, part-time, students. Teacher education requires a different kind of teaching and learning process to that understood and supported by HEIs.

Funding of teacher education is also faced with challenges. The current discussions propose to fund teacher education in the lowest category, even lower than business/commerce and social sciences. It also proposes to fund distance education at 50% of a full-time equivalent teaching subsidy for inputs, while contact education will be funded at 100% of a full-time equivalent (FTE) subsidy. There will be little financial incentive, therefore, to establish school-based assessment or adequate support for teachers to learn from the places in which they

⁷⁷ Parker B, 2003

⁷⁸ Reddy J, 2003

⁷⁹ Sayed

work or will work in future. In most Higher Education Institutions, therefore, teacher education is not highly regarded.⁸⁰.

6.3.2. Impact of the Reduction of institutions on Teacher Supply and Demand

The mergers and closures of colleges led to a decrease in the number of institutions providing educator education⁸¹. The college sector had ceased to exist and the rationalization process has overwhelmingly closed rural and African colleges. The one strength of the old system, namely the geographical spread of colleges through remote rural areas, has now been reversed. The closure of rurality -based colleges leaves South Africa with a geographical spread of higher education institutions less favourable than that which existed before the incorporation, and one that strongly reflects South Africa's apartheid history.

Transformation of higher education has resulted not only in the reduction of numbers of colleges but also impacted on the number of registered student educators over the years.⁸² There was also a "dramatic decline in student teachers in pre-service programmes: from 70 731 in 1994 to 10 153 in 2000". The most precipitous decreases occurred in provinces with existing teacher shortages:

Table 6.1

Province	1994	2000	Percentage Change
Eastern Cape	14 162	1373	(90% decrease)
KwaZulu-Natal	12 139	1 265	(90% decrease)
Mpumalanga	3 643	268	(93% decrease)
Northern Cape	5 109	209	(96% decrease)

Although Vinjevold's figures are incomplete, they do provide an idea of how dramatically teacher education has been re-shaped, and also of its less desirable unforeseen consequences.

Moving teacher education to Higher Education sector has also had an impact on the cost of teacher education. Access to working class students will be limited, as the cost of Teacher education has hiked. Teaching has become an "elitist" career. The cost to individuals and their supporters of a four-year B.Ed programme is between R84 000 and R120 000 and this is unaffordable for most students (particularly from previously disadvantaged communities) who aspire to become teachers. The bursaries offered by some PDEs are, by and large, poorly administered and their location is driven more by the perceived needs of the provincial schooling system than by the national demand situation. The National Student Financial Aid

⁸⁰ Sayed

⁸¹ HSRC 2005

⁸² Vinjevold 2001

Scheme does not seem to be in a position to offer a system of full cost loans for initial teacher education⁸³.

The closure of the former colleges of education and the entrance requirements and costs of Universities and Technikons has complicated the recruitment of students in teacher education. The entrance requirement aligned with university entrances excluded students without exemption certificates. Universities and technikons face a challenge: do they adhere to those strict entry requirements, or do they adapt these for prospective teachers given the declining number of students with a university entrance pass? Students with exemption are likely to choose other careers. The teaching profession in South Africa competes with other careers at a time when the attractiveness of school level teaching as a career is declining.

All of these factors, resulting from the policy changes in provisioning of teacher education have a direct impact on the access of teacher education. This has been greatly limited by

- ✓ the entrance requirements into the new qualification,
- ✓ geographic location of HE's offering teacher education,
- ✓ costs of teacher education

This in turn will impact negatively on the quantity of educators produced in South Africa. As fewer teachers are produced and coupled with drainage of the existing teachers, South Africa will face a shortage of teachers.

6.4. Recruitment and Retention Strategies

To attract new teachers and retain those already in the system South Africa needs to:

- ✓ employ effective recruitment strategies and
- ✓ create attractive working conditions for educators.

6.4.1. Recruitment and Employment of teachers

It should be noted that most teaching appointments in South Africa are not filled by assignment, but by a competitive recruitment and appointment process that is organised by each school individually, where the general responsibility for recruiting and selecting staff and for making appointments lies at the level of the school's governing body, although the employment position may be different.

Generally, in South Africa the number of teachers a school employs is determined by the education departments and governing body of the school on the advice of the principal who will have considered all the relevant issues at national and local level in the context of the school's overall policy and aims. When a teacher leaves, the governing body, or its sub-committee, will consider whether or not to replace the teacher, and in what manner, given the overall pattern of teachers in the school. They may decide not to replace a teacher directly,

⁸³ A National Framework For Teacher Education in South Africa, June 2005

or to seek a teacher on a different form of contract from before (temporary, permanent, full-time, part-time).

Those seeking employment as teachers apply in response to an advertisement, normally filling in a form that will require specific categories of information, and often also making a specific letter of application. They are also normally expected to supply references from their current employer (if teaching), or their training institution (if newly qualified). Additional references may also be asked for, particularly in the case of denominational schools.

The degree of competitiveness and the status of teachers vary with the overall economic situation: anecdotal evidence suggests that teaching becomes a more desirable career when other jobs are less available or unstable.

Employment of educators is a provincial department's competence that is governed by:

- *The Post Provisioning Model.*

The number of teachers leaving the profession because of turnover and/or natural attrition, such as retirement, and the extent to which districts are appointing qualified teachers for newly created positions affects the demand for teachers. In addition, the number of vacancies in the number of positions open because of turnover and attrition affect demand. Since 1998, educator posts have been distributed amongst schools on the basis of an affordability-driven post provisioning model using as inputs mainly straight enrolment, but also grade in which learners are enrolled, language of learning and teaching, and curriculum offerings in Grades 8 to 12. The use of curriculum offerings in the model in the case of secondary schools caused some controversy, because historically advantaged schools tended to offer more scarce subjects, such as music and certain technical subjects, and therefore enjoyed a slight advantage in terms of the overall L: E ratio.

Part of the problem was the slow speed with which curriculum equalisation for Grades 10 to 12 occurred across the schooling system. The post provisioning aspect, though not the curriculum aspect, of the problem was addressed in 2002 with a pro-poor weighting, which effectively cancelled out the advantage that certain middle class schools had enjoyed. The pro-poor weighting currently governs 2% of all educator posts, though this will rise to 5% within some years⁸⁴.

Vacancies

The preliminary findings of a study being conducted by DoE revealed that virtually all of the districts surveyed indicated that they are currently having difficulty recruiting and employing new teachers. Of the 372, 689 teaching posts reported by the Department of Education, there are 14,329 unfilled vacancies.

⁸⁴ Plan of Action: Improving Access to Free and Quality basic education for all; 2003

Table 6.2.: National Educator Appointment Rates based on new appointments

Financial Year	Appointments	New Appointments	Appointment Rate
1998/1999	380 311	7 381	1.90%
1999/2000	368 281	5 388	1.50%
2000/ 2001	362 521	7 207	2.00%
2001/ 2002	360 203	9 640	2.70%
2002/2003	366 320	13 805	3.80%

Source: ELRC/HSRC 2005

The table above shows that the appointment rate was lowest in 1999/ 2000 where it was 1.5% of total appointments, rising to 3.8% in 2002/2003. In addition this study showed that in 2002/03, 65% of all new recruits to teaching were aged between 25 and 35. A further 23% were between the ages of 35 and 44. Relatively small proportions were found amongst older age groups (45 to 54 and 55 plus) and those aged less than 24. The proportion of new recruits to teaching amongst 25-34 year olds has increased considerably over the 5 year period 1998/1999 to 2002/2003, from 53% to 65%. Relatively more educators are also being recruited amongst those less than 24 years of age: in 1998/1999 it was 0.01%, but by 2002/2003 had risen to 3.7% of all new appointments.

Despite improved appointment rates, filling of vacancies is still a challenge the Department of Education is faced with. A further analysis of which posts are not being filled, reasons, and geographic distribution of such vacancy posts is necessary. Leaving these vacancies unfilled impacts on the quality of education, because it leads to these posts filled by unqualified teachers. If that is not the case other educators are overloaded with teaching as they have to share the workload of the vacant post. This causes problems especially when the teachers then have to teach outside of the area of specialisation.

6.4.2 RECRUITING AND RETAINING TEACHERS IN RURAL AREAS

Recruiting educators for rural schools is one of the challenges facing the department of education. The teaching profession in rural areas is characterised by a critical shortage of qualified educators particularly in physical science and mathematics. Morale is low because of poor conditions of service and the dire teaching environment in many schools⁸⁵.

To improve recruitment of rural teachers:

- ✓ Administrators must target candidates with rural backgrounds or with personal characteristics or educational experiences that predispose them to live in rural areas. The emphasis on background and experience is crucial for racially or culturally distinct communities.

⁸⁵ Ministerial Committee Report on Rural Education: A new vision for rural schooling; 2005

- ✓ Selling points in recruitment efforts are the benefits of teaching in rural schools, such as few discipline problems, less red tape, more personal. Many rural teachers were raised close to where they now teach.
- ✓ Various “grow-your-own” strategies offer incentives to local residents with potential to become teachers, such as assisting them in obtaining the needed education and training. For example, one organization encourages students to consider returning to their home communities once they have received teaching credentials.
- ✓ Higher Education Institutions must take more of role in recruiting students who demonstrate the characteristics of successful rural teachers.
- ✓ Higher Education Institutions HEIs should recruit aggressively in high schools, exposing students to peer tutoring, counseling, role modeling, and classes in education theory.

To improve the retention of Rural Teachers

- ✓ HEI’s develop Programmes that offer a rural focus in course work and provide ample opportunities for rural experiences. In rural settings, training must be geared to add value to experiential knowledge that teachers have already of a place, so that the appropriate technology can be introduced in a given situation.
- ✓ Co-ordinated school-community orientation can help new rural teachers overcome feelings of isolation, acquire a sense of community security, and develop professional competence. The community should recognize new teachers’ accomplishments and invite them to participate in various activities. Keeping teachers in rural areas up-to-date is also very important.
- ✓ Principals should select a new teacher’s initial assignments carefully, set clear goals, welcome feedback, establish an encouraging and non-threatening environment and provide opportunities to interact with experienced colleagues and parents. New recruits into the system, and teachers on redeployment, have been crying about the absence of mentorship, induction and assimilation programmes at the new schools of placement. This leads to a lot of wasted time as new teachers try to find their place in the “pecking order” at the school. This is the task of management (Principal and School Management Team).
- ✓ Collegial mentoring-that is not part of the IQMS (teacher evaluation)-can be crucial. The school can also ease the way for new teachers by streamlining paperwork, providing a well-planned in-service programme, and arranging release time for visiting other teachers’ classrooms.

- ✓ A more compensatory approach by government, or in combination with efforts by SGB's to assist teachers that might be staying far from established homes (where some might even have applied for mortgages and paying bonds). The compensation could look at covering either cost of alternative accommodation closer to the school, or transport costs.

6.4.3. Improving conditions of Employment for Educators

Improved conditions of service are key in retaining educators in the profession. From the moment the educator joins the teaching employment conditions must be in place to ensure that they grow into the profession.

Induction

Currently there are probationary or induction arrangements in all nine provinces. These have in all cases been substantially revised and developed in recent years in response to various pressures. Induction is now understood in the context

- ✓ securing an early foundation for continuing professional development is a necessary element of successful career development;
- ✓ newly qualified teachers need particular attention and support that will build on their initial training;
- ✓ induction support will help teacher retention in the first year;
- ✓ a probationary period acts as a further check on teacher competence.

In all cases the revisions relate to a general move to see professional development as a continuous process throughout the teaching career. The competences or standards identified for induction build on those for initial teacher training. In South Africa this is part of a continuous process of development extending into the second and third years of teaching. Coupled with other motivating factors, by creating and promoting a supporting environment for new teachers to grow, induction plays a crucial role in retaining educators.

Career Pathing

Career pathing should provide educators with opportunities to progress either laterally or vertically in the education system but also to keep educators involved in classroom teaching by providing teaching and learning related progression opportunities on all salary levels up to director⁸⁶. In South Africa the development of a clear career structure for teachers has been identified as a major element in the strategy to retain teachers in the profession.

⁸⁶ Education Labour Relations Council Annual Report 2001

For a while the career pathing of educators in South Africa had three distinct paths viz:

- ✓ Office based
- ✓ School based
- ✓ College based employees

For virtually all educators there was no chance of promotion further than a limited stage. A further weakness was that the entry level for educators differs based on formal qualification alone. The system made no provision for salary progression. As a result many teachers remain on the same salary level for many years⁸⁷. This is one of the factors contributing to low job satisfaction and a motivator for seeking better-paying options and careers, most-times out of education.

Most positions are on a particular salary scale, and the individual will be assigned to a particular point on that scale on appointment (bearing in mind their previous salary), and normally move up that scale annually until they reach the top of the scale attached to that post. The new Post and Salary Structure ensures that educators are free at anytime to choose where they want to be i.e. either Managers or Classroom Educators, an option that has been missing. Teachers are no longer being forced to go into management in order to progress in terms of salary. An Educator may choose to remain classroom-based and still be able to progress in terms of salary.

Finally, the new structure makes a distinction between Post and Salary Structure, where the Post Structure indicates the level of authority and the Salary Structure indicates the complexity of the job.⁸⁸

This progress has until now been nominally based on satisfactory performance, but it has been extremely rare for a teacher not to be given any due annual increment.

Remuneration/ material incentives

The Department of Education is in a process of investigating the possible introduction of an incentive scheme for educators. This anticipated scheme is aimed at achieving the following objectives:

- ✓ Attract educators to teach scarce subjects
- ✓ Attract educators to teach in remote areas
- ✓ Retain educators currently teaching scarce subject and in remote areas.

⁸⁷ See ELRC June 2000 study on career pathing and post grading system for educators

⁸⁸ http://www.naptosa.org.za/Update/first_2003_05.html

Post and salary structure, Pay progression and Performance management

In 2001 the education system required that educators with a three year degree (M+3) start on salary level 6, while those with a university degree (M+4) start on level 7. This led to distortion of the grading system and provided exaggerated differentials⁸⁹. The salaries of all educators have been translated into the new 16-Notch system with effect from 1st April 2003, in line with Resolution 9 of 2001.

This pay system for educators is relatively attractive for new entrants. However, after five to eight years, the salary structure is relatively uncompetitive. The challenge is to redesign the pay structure to retain good, experienced educators, but to also attract new entrants into the profession. If starting salaries are too low, attracting people to the profession would be difficult. However, if salaries are not increased in real terms as people progress through the system, attrition rates will remain high.

Salary progression is also essential in retaining educators in the system. This movement can be based on competency, years of experience etc. In South Africa progression within a salary level or a promotion from one post to the next should take cognizance of the following:

Criteria for the assessment should be defined and could include competencies, qualifications and experience.

Performance should be part of the criteria but we caution against its implementation until a performance appraisal system is developed and accepted by all.

For practical reasons and comparison purposes, the salary scale for educators should be aligned with the existing public sector salary scale. ⁹⁰

The Salary Progression is in line with other agreements in the sense that each salary level will have 16 notches and educators will be able to progress from one notch to the next in terms of the instrument contained in Resolution No.1 of 2003.

In terms of the new Post Structure, there are some "categories" where it is possible to move from one salary level to the next through grade progression. For example, an educator on Salary Level 6 may progress (grade progression) to Salary Level 7. The following principles apply in terms of grade progression:

Grade Progression is not vacancy-based.

An educator may only progress to the next grade after completion of the last notch in the previous grade, except for Post Level 1 where an educator would be eligible for grade progression after completing the 14th Notch.

An educator will become eligible for grade progression if his/her performance has been "good" for the past three years, in terms of Resolution 1 of 2003. For the first three years of implementation, a phased-in approach will be adopted⁹¹.

⁸⁹ Education Labour Relations Council Annual Report 2001

⁹⁰ See ELRC study on Career Pathing and Post grading system for educators, June 2000

Leave Provisions

The Employment of Educators Act 76 of 1998 regulates and provides for various Leave Measures that Educators are entitled to including, specifically, Special Leave for Study purposes. It is important to remember that leave is subject to regulations negotiated and approved on either the provincial, regional or local level. In brief, teachers can take leave for a limited time for various reasons: death of a family member, marriage, moving, natural disaster, illness or any other reason judged appropriate by the school board.

Under certain conditions and given their consent, teachers can be seconded to other schools or institutions requiring their services. Teachers can also take advantage of a programme to defer a percentage of their salary to cover a future sabbatical. Leave without pay other than that allocated for parental leave, public office or union activities is subject to stipulations negotiated and ratified at the local or regional level.

Finally, teachers at all levels of instruction have a legal right to about 20 school days per year that, with the agreement of the school board and the individual school administration, can be used for pedagogical planning, professional development or participation in pedagogical or subject-specific conferences.

Professional Assessment

The main objective is to ensure quality public education for all and to constantly improve the quality of learning and teaching, and for this we are all accountable to the wider community. The Department has the responsibility of providing facilities and resources to support learning and teaching. Successful educational outcomes also depend upon empowering, motivating and training educators. Quality Management seeks to monitor and support these processes.

The IQMS can be conceptualized from various angles. It is a system that consists of three inter-related programmes:

- ✓ Developmental Appraisal - to appraise individual educators in a transparent manner with a view to determining areas of strength and weakness, and to draw up programmes for individual development.
- ✓ Performance Measurement - to evaluate individual teachers for salary progression, grade progression, affirmation of appointments and rewards and incentives.
- ✓ Whole School Evaluation - to evaluate the overall effectiveness of a school - including the support provided by the District, school management, infrastructure and learning resources - as well as the quality of teaching and learning.

⁹¹ http://www.naptosa.org.za/Update/first_2003_05.html

The introduction of the new Post and Salary Structure, Pay progression and performance management, Professional Development, Career-Pathing, the Multi-facetted incentive scheme as proposed by the Department of education, the increased re-capitalisation of the education system with a 12.5 Billion Rand injection for the current budget year; are all major steps designed to ensure that South Africa is poised to cater for the adequate provision of highly qualified, motivated and sufficient teachers to meet the EFA goal of accessible, quality education for all by 2015.

Future research

- 1. A full scale study on teacher supply and demand**
- 2. Future research must look at why the teachers are going, where they are going, and what would encourage them to come back to public employment.**

7. CONCLUSION

In South Africa, there is no separate EFA plan, but the national Department of Education has made some headway in its attempts to ensure that South Africans have access to quality education, most of which are in alignment with the EFA goals.

Although the education legislations are not developed with the EFA goal as the base principles, the South African Education legislation easily lend itself to the principles of EFA by 2015. By following the objects of the South African Constitution and the ANC Freedom Charter, their very basis is to ensure that all South African receive quality education presently and in the future and in so doing is congruent with the aims, principles and strategies of the EFA by 2015

A dynamic and thriving collective bargaining facility for educators exist. This is important for the maintenance of a body of teachers that will know that their best interests are always at hand and can negotiate for better conditions of employment, conditions of work, adequate and fair remuneration, and for their own professional development, so that ultimately more quality teachers are available for the attainment of constitutional and EFA imperatives

There seems to be a decline in number of learners. Existing drop out rates that are due to poverty, illness, lack of motivation and trauma are likely to increase as cases of HIV/AIDS increases. HIV/AIDS is also likely to slow population growth rates and alter the structure of the population. As the proportion of potential parents (20-40) declines, numbers of orphaned children increase and poverty decreases school enrolment will decline and drop out rates will rise.

If the statistics showing a decline in learners and decline in educators is correct, then it is safe to assume that the South African teacher supply and Demand is in a state of equilibrium. In other words if the decline in numbers of learners is matched by decline in educators or matched by a corresponding equivalent change in teacher supply, there will be no teacher shortages in South Africa by 2015 or any other year.

Teacher supply and demand is affected by interplay of factors. The impact of HIV/AIDS on teachers is profound. More teachers are getting ill absent and are dying. Yet teacher supply is struggling to keep up with this demand. Teacher Education institution are not producing enough teachers as the institutions struggle to attract new candidates to the profession.

Research reports conducted between 1997 and as recently as May 2005, on teacher supply and demand in South Africa have led to an understanding by stakeholders within the system, that there are presently no quantitative shortages of teachers in South Africa. However, the same studies have made it clear that if present attrition and turnover issues are not addressed, whether related to HIV/AIDS or not, the implications are immense. In the education system this translates, amongst other things into shortages in educator supply and costs in recruitment, training, development and mentoring.

The present composition of teachers portrays a profession that is characterized by shortages of female leaders and of female educators in critical subjects such as Mathematics, Science and technology. It also depicts a profession with an attrition rate that is not balanced by an adequate supply of new educators.

Teacher supply is reduced by a hemorrhage of teachers who leave the profession before retirement age and keeping teachers in the teaching profession has become a challenge. This certainly has also had an impact on the quality in the teaching force

This implies that South Africa may experience shortages at three levels. First there is likely to be increased shortages of teachers in predominantly rural school due to difficulty in recruitment of educators (old or newly qualified) willing to work in rural contexts. Secondly there is likely to be a shortage in urban schools with urban teachers leaving teaching to explore other career opportunities or migrate to other countries (even if it might be for a short-term, the trend will have been set); Thirdly, a qualitative shortage: If the profession is becoming increasingly feminised, then the drain on the numbers of presently, mostly male teachers of scarce subjects such as Mathematics, Science and Technology, will affect the provision of teachers of those subjects in a big way.

A considerable number of those who do decide to join the teaching profession leave for other jobs long before reaching retirement age. Factors contributing to these high rates of teacher attrition include illness and bottlenecks in teacher preparation systems. A variety of unattractive conditions of service also play a strong role in limiting teacher supply. These include perceived low salary, arbitrary teacher deployment systems, unattractive work locations, unprofessional treatment of teachers, lack of professional development opportunities, and insufficient supportive supervision. Another strong pushing factor is the low opinion that society has of teaching. Teaching is considered a low-status career and well-qualified teachers have increasing alternative employment opportunities in other sectors of the economy.

The combination of teachers leaving the profession in droves and of teachers dying or leaving the profession due to HIV/AIDS could lead to both qualitative and quantitative shortages if not assuaged. The HIV/AIDS pandemic could prove to be one of the biggest single contributors of a mass shortage of teachers if left to its own course.

South Africa faces challenges with their pool of available educators. One of these challenges is that of attracting new educators into the teaching profession and another is the challenge of how to retain those already in the system. At present South Africa is not producing enough teachers to balance out the effects of annual attrition. In this section we explore the approaches employed to attract new teacher candidates and those used to retain the educators in the profession.

The profile of existing teacher candidates reveals that the students intending to go into teaching are more likely to be female, young, be studying English rather than science, engineering and are white. There are a few black student teachers particularly in the

foundation phase. The 'surprising factor' is that 'white participation (has) increased'⁹². The speculation is that reasons for this may be linked on the one hand to the fact that the formal economy is opening up at a faster rate for Africans than are opportunities for teachers, or relative opportunities for whites have waned faster and on the other to the increase in teacher posts created by school governing bodies

According to some of the more current research from 1999 to 2003 there has been an overall steady decline in student-educators enrolment by approximately 24.3%. The decline in enrolment is significant among Africans

The closure of the former colleges of education and the entrance requirements and costs of Universities and Technikons has complicated the recruitment of students in teacher education.

However teacher recruitment targets may be lower than at present if enrolments decline or do not grow as expected.

⁹² Crouch and Perry 2003

Quantitative estimate of the State of Teacher Shortages by 2015

It is estimated, given the figures in different reports, that if left entirely unattended to, the status quo, could still maintain itself for a period of about three to four years (to 2009), after which a rapid decline would be experienced. The considerations for this statement are the following:

1. The level of new recruits into the profession is far below that required to cater for the annual replacement of teachers lost to attrition factors. [Nett inflow from HET annually is about 5,500], [Annual estimated attrition average is 20,000]
2. A pool of qualified, but unemployed teachers is currently documented to be 10,882
3. There are indications that teachers that leave for Overseas countries or abroad plan on a two year return-window. [Every two-year window will return about 50% of the 28% that opt to teach outside the country. In real terms, an estimated 2,520 qualified and well experienced teachers will be available for service on an annual basis]
4. HIV will decimate an ever-increasing number of teachers per year if left unchecked. This will have the effect of increasing the attrition rate considerably, and we have to caution against the snow-balling effect caused by increased absenteeism due to lowered teacher morale when educators witness colleagues succumbing to the effects of HIV/AIDS
5. The generally lowered public perception of the teaching profession will not work in favour of encouraging more quality candidates into the teaching profession, thus witnessing a higher number of poor quality teachers coming into the profession. This will have a devastating effect on the resultant quality of teaching and learning.
6. Government's efforts at offering pro-poor funding, coupled with an increase in social grants made available to orphans and care-givers, will mean learner numbers will not be dropping as would be expected if members of families are dying due to HIV/AIDS. This would increase the pressure on the department of education to provide increasing numbers of teachers to the public school sector to cater for this, as per the Post-Provisioning Norms.

Based on the above considerations and other less measurable influences to the system, If left unchecked or unattended to, the present apparent equilibrium enjoyed by the education system will disintegrate within a real-time estimate of 4 years.

After that, there will be a steadily increasing deficit to the system, in the provision of teachers, by a nett 12,480 teachers per annum that will have no recourse for replacement. This will and can snowball into a considerable number by 2015. Starting from 2009, till 2014, there could be an estimated shortage of 62,400 teachers or more.

8 RECOMMENDATIONS

Despite massive strides and achievements conducted between 1994 till the present, a view of existing literature and the findings of the focus groups / indicates a system that is far from well.

If, as suggested by this research, the teaching force is not happy enough to go into their work areas and teach; HIV and AIDS continues to ravage the teaching profession; our initial teacher education system is not attractive enough to new entrants and not producing enough teaching graduates; remuneration, incentives and conditions of teaching and learning are not attractive enough to attract and retain educators; educators are not evenly distributed and utilized to ensure geographic equity (between rural and urban contexts); then indeed, we do stand at the threshold of a looming shortage in teacher numbers. While there may be no immediate crisis, if the looming threat resulting from interplay of the above factors is not appropriately addressed, it may lead to acute shortages in teacher supply in the future.

Education Policy and Planning

Provincial education departments (PEDs) should develop or refine comprehensive data systems that provide information on teacher supply, teacher quality and teacher mobility. This information must be analysed, documented and fed to the Department of Education to assist with policy formulation.

To develop effective data systems, a high degree of co-operation among key players is critical. All necessary parties must participate in the data development and collection effort, and ministers and legislature MECs must be supportive.

Policies for recruitment must be balanced by policies for retention. Recent studies recommended retention strategies to address impending shortages. These must include the Department of Education developing a national plan in partnership with educator and labour representatives, parents and other stakeholders⁹³. It is important to listen to the teachers and address their concerns.

Aligning recruitment policies and practices with the interests and expectations of prospective teachers will become even more crucial⁹⁴.

⁹³ LRC study

⁹⁴ NFTE report 2005

Teacher Education and Professional Development

The Department of Education and Provincial Education Department must ensure financial accessibility to teacher education through financial assistance means, such as contract bursaries.

Every new teacher should be required to participate in a formal induction and/or mentoring programme for at least two years, to be developed at the local district level or school site to provide extensive and intensive professional development for all new teachers.

The final year of initial teacher education could be used as a period of site based teacher development through a “practical internship”.

Teacher Recruitment and Retention

Recent research has suggested that, to ensure that there are adequate numbers of educators to serve the system⁹⁵, there has to be an immediate increase in the number of students recruited into teacher training.

The Department of Education must assess the supply of educators in rural areas. It must consider gender equity and consider the current shortages of trained educators in key learning areas and how recruitment and retraining of unemployment educators can alleviate existing and potential shortages.

The department of Education must engage in a recruitment drive amongst rural communities with new entrants obtaining bursaries and reconsider an induction year in rural areas⁹⁶. Strategies to attract black teacher candidates particularly to specialize in foundation phase foundation must be put in place to ensure a continual supply of these teachers

A countrywide advisory group should be appointed to plan and advocate for policies and strategies to help school districts succeed in recruiting and retaining well-qualified teachers in difficult to fill teaching fields.

Drastic and diabolical short-term solutions would involve:

The survey conducted at the University of KwaZulu Natal proves that quite a considerable number of foreign nationals come to study at South African Institutions of higher learning. Some come from countries, that preliminary estimates indicate could have teacher surpluses or equivalent. The South African Government could enter into arrangements with the Governments of those countries for a programme where these South African trained teachers could be made available, much the same way as the department of health has Cuban Doctors under an arrangement to offset the increasing shortage of medical personnel.

⁹⁵ Hall 2002

⁹⁶ Ministerial Report on Rural Education 2005

Teacher Remuneration and Material Incentives

Salary increases are the most direct and powerful way to demonstrate the value accorded to the education profession. A lack of financial progress following entry into the profession could encourage attrition after a few years and should be addressed⁹⁷.

Teachers should be released from administrative tasks and other activities that increases their workload and distract their attention.

Teachers need more steps on their career ladders across their entire career path. The promotion structure should allow for career advancement opportunities that do not remove educators from the classroom⁹⁸.

Create financial incentives to recruit and retain teachers in hard to fill (shortage area) teaching positions. Shortage areas should be defined for this purpose at the level of Districts. These incentives should be developed and tried for a three-year period and their impact on employing well-qualified teachers monitored and evaluated. Incentives might include salary increments, bonuses for continuing in teaching positions for three or five years and support for professional development. The cost of financial incentives should be shared between the education department and the provincial treasury⁹⁹.

Financial incentives offered by employers, such as scholarships, arrangements to pay specialist teachers' accumulated higher education contribution scheme (HECS) debt, and assurances of employment (often in specified rural areas), have proved successful in drawing an expanded cohort of suitable people to teaching¹⁰⁰.

Teaching and Learning Conditions

The NFTE report suggests interventions that are necessary to sustain the recruitment of teachers into teaching. For example, a campaign for the renewed status of teachers. Media campaigns to positively image teachers must be put into place.

Public awareness and appreciation of teaching as a profession has to be raised.

⁹⁷ LRC study

⁹⁸ LRC study

⁹⁹ LRC study

¹⁰⁰ NFTE Report 2005

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