

The influence of teacher unions on the appointment process of promotional positions at public schools

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DECLARATION

I, the undersigned, declare that the dissertation titled, THE INFLUENCE OF TEACHER UNIONS ON THE APPOINTMENT PROCESS OF PROMOTIONAL POSITIONS AT PUBLIC SCHOOLS, and the content herein is my original work. I declare that I have not previously in its entirety or in part submitted it at any university for a degree. I also declare that all the sources that were used or quoted, have been indicated and acknowledged by complete references.



Signature: Mario Esteves Matos

Date: November 2021

This dissertation is dedicated to my loving mother, Joaquina Matos, who epitomises love and all its virtues.

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I lift up my eyes to the hills-- where does my help come from? My help comes from the LORD, the Maker of heaven and earth. Indeed, He who watches over Israel will neither slumber nor sleep – *Psalm 121:1-2*.

Glory and honour to Almighty God, on whose name our prosperity is guaranteed.

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To the person reading this dissertation, may we learn to be open-minded and kinder towards ourselves and to others. May we be virtuous and accepting of things beyond our control. May we give ourselves more credit, see mistakes for what they are and allow every experience to shape our characters. May we be zealous in all our endeavours. May we be persistent and tenacious in our purpose and go about life with a sense of aspiration and ambition so that the world can catch

our spirits. Remain humble after every achievement, be resilient after every setback and cherish life-changing experiences. In the words of the radio presenter Sentle Lehoko: May His grace and light shine upon you... And if it doesn't; He might take his time, but He'll definitely come through for you.

Godspeed.

Don't forget to pray!

ABSTRACT

The focus of this research study is to determine what influence teacher unions have on the appointment process of teachers regarding promotional positions at public schools. This focus is linked to the opinion of Darling-Hammond (2017:292), who claimed that there is an increasing focus on the effectiveness of teachers and the output of public schools. The appointment of teachers is, therefore, potentially the starting point for the provision of quality education, meaning that the focus on this process is linked to the potential influence of teacher unions in the appointment process.

Essentially, the researcher deciphers the impact of conscious activism and leadership. This means that the researcher will need to look at aspects of school governance, school policies and the links between politics – i.e., micropolitics, to be precise - and governance within the basic education system. Furthermore, the researcher investigates how teachers perceive the role of teacher unions in the appointment process. Considering the latter, the researcher probes whether there are prominent centres of power that ultimately contribute to the dysfunctionalities at public schools.

According to Khanyi (2013:14), qualitative research investigates organisational functions and behaviour. Therefore, this research study adopted a qualitative approach with the aim of investigating the phenomenon/occurrence of interest. Phenomenology is employed as the research methodology for this study. This, according to McMillan and Schumacher (2014:372), supplements the researcher's aim to investigate and interpret the experiences of participants to understand the meaning of a particular occurrence.

The research is based on an interpretivist philosophical orientation, which according to Nieuwenhuis (2016:60), takes the form of an “anti-positivist” paradigm. This paradigm serves as a counter-reaction to positivism, which encourages the researcher to approach the research study from a critical and constructivist perspective, which gives an individual the ability to construct meanings by emphasising a particular phenomenon. Furthermore, by applying purposive sampling, the researcher looks to maintain the specific objective of determining the influence of teacher unions on the appointment process of teachers at public schools.

Ultimately, the researcher recognises the social value and the importance of scientific validity to develop as an academic in the field of educational leadership and management. The researcher is conscientious of the fact that the interests of the participants are more important than the outcomes of this study. Therefore, there should always be transparency and advocacy for mutual respect and adherence to the prescribed research guidelines.

Keywords: Teacher union, influence, governance, micropolitics, cadre, quality education, policy, power, advocacy, promotional position, appointment process.

OPSOMMING

Die fokus van hierdie navorsingstudie is om te bepaal watter invloed onderwysersvakbonde het op die aanstellingsproses van onderwysers met betrekking tot bevorderingsposte by openbare skole. Hierdie fokus word gekoppel aan Darling-Hammond (2017:292) se mening wat beweer dat daar op 'n toenemende wyse gefokus word op die effektiwiteit van onderwysers en die resultate van openbare skole. Die aanstelling van onderwysers is dus die beginpunt vir die voorsiening van kwaliteit onderwys, wat beteken dat die fokus van hierdie verskynsel gekoppel is aan die moontlike invloed van onderwysersvakbonde in die aanstellingsproses.

Die navorser ontsyfer die impak van doelbewuste aktivisme en leierskap wat beteken dat die navorser kyk na aspekte van skoolbestuur, skool gebaseerde beleide en die skakels tussen politiek – d.w.s, mikropolitiek om presies te wees – en bestuur binne die basiese onderwysstelsel. Verder ondersoek die navorser hoe opvoeders die rol van onderwysersvakbonde in die aanstellingsproses beskou. Met inagneming van laasgenoemde, ondersoek die navorser of daar prominente magsentrums is wat uiteindelik bydra tot die disfunksionaliteite by openbare skole.

Volgens Khanyi (2013:14) ondersoek kwalitatiewe navorsing organisatoriese funksies en gedrag. Daarom volg hierdie navorsingstudie 'n kwalitatiewe benadering wat daarop gemik is om die verskynsel van belang te ondersoek. Fenomenologie word as die navorsingsmetodologie/metode vir hierdie studie aangewend. Volgens McMillan en Schumacher (2014:372), vervul dit die navorser se doel om die ervarings van deelnemers te ondersoek en te interpreteer om sodoende die betekenis van 'n bepaalde gebeurtenis te verstaan.

Die navorsing is gebaseer op 'n interpretivistiese filosofiese oriëntasie, wat volgens Nieuwenhuis (2016:60) die vorm van 'n "anti-positivistiese" paradigma aanneem. Hierdie paradigma dien as 'n teenreaksie op positivisme, wat die navorser aanmoedig om die studie vanuit 'n kritiese en konstruktivistiese perspektief te benader en stel die navorser in staat om betekenis te konstrueer deur 'n bepaalde verskynsel te beklemtoon. Verder, deur doelgerigte steekproefneming toe te pas, probeer die navorser om die spesifieke doelwit om die invloed van onderwysersvakbonde in die aanstellingsproses van opvoeders by openbare skole te bepaal.

Die navorser erken die sosiale waarde en die belangrikheid van wetenskaplike geldigheid om as 'n akademikus op die gebied van onderwysbestuur en -leierskap te ontwikkel. Die navorser is pligsgetrou aan die feit dat die belange van die deelnemers belangriker is as die uitkomst van hierdie studie. Daarom moet daar altyd deursigtigheid en voorspraak vir wedersydse respek wees, en die handhawing van voorgeskrewe navorsingsriglyne.

Sleutelwoorde: Onderwyservakbond, invloed, bestuur, mikropolitiek, kader, kwaliteit onderwys, beleid, mag, voorspraak, bevorderingsposte, die aanstellingsproses.

LIST OF ABBREVIATIONS

ANC	African National Congress
BELA draft Bill	Basic Education Laws Amendment draft Bill
CATA	Cape African Teachers' Association
COSATU	Congress of South African Trade Unions
CTU-ATU	Combined Trade Union of Autonomous Trade Unions
DBE	Department of Basic Education
DoE	Department of Education
EEA	Employment of Educators Act 76 of 1998
EEA	Employment Equity Act 55 of 1998
ELRC	Education and Labour Relations Council
DH	Departmental Head
GDE	Gauteng Department of Education
HoD	Head of Department
HR	Human Resources
KZN	KwaZulu-Natal
LRA	Labour Relations Act 66 of 1995
MEC	Member of the Executive Committee
MTT	Ministerial Task Team
NEA	Native Educators Association
NAPTOSA	National Association of Professional Teachers Organisation of South Africa.
NATU	National Teachers Union

PAM	Personnel Administration Measures
PED	Provincial Education Departments
PEU	Professional Educators Union
PPM	Post-Provisioning Model
PPN	Post-Provisioning Norm
PPS	Post-Provisioning System
RAM	Resource Allocation Model
SA	South Africa
SACE	South African Council for Educators
SACMEQ	Southern and Eastern African Consortium for Monitoring Education Quality
SADTU	South African Democratic Teachers Union
SAOU	Suid-Afrikaanse Onderwysersunie
SASA	South African Schools Act 84 of 1996
SGB	School Governing Body
SMT	School Management Team
TATA	Transvaal African Teachers' Association
UNESCO	The United Nations Educational, Scientific and Cultural Organisation
USA	United States of America

LIST OF ADDENDUMS

Addendum A

- Ethics certificate

Addendum B

- Example of letter of permission requesting to conduct interviews with participants

Addendum C

- Example of informed letter of consent of research

Addendum D

- Interview schedules

Addendum E

- North-West Department of Education Circular: Departmental circular no. 58 of 2020

Addendum F

- Language editor declaration

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- Turnitin Report

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Chapter 1: Orientation

1.1. Introduction and Background

Teaching is a very noble profession that shapes the character, calibre, and future of an individual. If the people remember me as a good teacher, that will be the biggest honour for me. - A. P. J. Abdul Kalam –

The focus of this research is to determine what influence teacher unions have on the appointment process of teachers regarding promotional positions at public schools. This focus is linked to the opinion of Darling-Hammond (2017:292), who claimed that there is an increasing focus on the effectiveness of teachers and the output of public schools. Darling-Hammond (2017:292) stated that teacher effectiveness has become the most important school-related factor in student achievement. The appointment of teachers is, therefore, potentially the starting point for the provision of quality education, meaning that the focus on this process is linked to the potential influence of teacher unions in the appointment process.

For the past 25 years, South Africa has been going through a protracted political transitional phase and has taken huge strides towards establishing social transformation and empowering the previously disadvantaged. The first black union that was formed in 1879, according to Govender (1996:27), was established to deal with educational, social, and political issues. Furthermore, according to Heystek and Lethoko (2001:223), the Native Educational Association dealt with issues regarding the pass laws on the provision of education, and the discriminatory nature of salary scales between white and black teachers who held the same qualification.

In addressing the imbalances of the past – i.e., the educational provisions, and unequal salary scales etc. – as mentioned by Heystek and Lethoko (2001:223), a host of policies have been developed in an attempt to achieve a fully functional democracy that is based on principles of socialism. According to Asmal and Wilmot (2001:186), a democratic approach to education is grounded on the constitutional values of non-racism, non-sexism, and equal access, with the latter being the most important determinant – i.e., equal access – keeping in mind the educational provisions that were applied pre-1994. This specific study secondarily focusses on allowing people to make themselves eligible for career-oriented positions that may advance them academically and economically, which is what a teacher union like the Native Educational Association advocated for. Asmal and Wilmot (2001:186), argued that the sustainability of education lies in maintaining a democratic ethos in civil life. Considering the essence of this research study, the researcher argues that the kind of influence exercised by unions, in the form of member-advocacy, goes against the democratic ethos of civil life. From this, one can descend that maintaining a democratic

ethos serves as an active step towards the establishment of social justice; considering the availability of opportunities (or lack thereof), which is so often noticed in South Africa.

The aim of the South African education system is for education in South Africa to be the joint responsibility of all South Africans who have an interest in education to help build a just, equitable and high-quality education system for all the citizens (R.S.A., 1995). The collaboration of policies such as, the Labour Relations Act 66 of 1995, the South African Schools Act 84 of 1996 and the Educators Employment Act 76 of 1998 including other employment policies relevant to recruitment play a vital role in effectuating this constitutional vision while enhancing the quality of education to all and ultimately providing all education stakeholders with a position in the appointment process. This principle ensures fairness, transparency, and quality in the entire recruitment process.

Policies would need to be implemented to ensure that all citizens have equal access to available job opportunities. Therefore, one would be naïve to ignore the role that unions play in the process of transformation. The output of schools, however, has come under a lot of scrutiny in recent times. According to Modisaotsile (2012:1), the government needs to ensure that schools are equipped with the necessary resources to ensure optimal functionality and qualified teachers. There has been a growing concern over the quality of our education, especially within public schools. Modisaotsile (2012:1) referenced an article which was published in 2011, wherein Mrs Angie Motshekga (the current minister of Basic Education), stated the lack of focus by teachers was the reason why the education of black South African children was in crisis. Modisaotsile (2012:3) further stated that ineffectiveness within the education reforms is due to some sort of corruption. She refers to teachers who do not show up for work or those who are unwilling to teach well. This reluctance to cooperate mirrors a corrupt mentality that undermines the educational and democratic values of the country.

According to Patitilo (2012:15), erroneous leadership is also prevalent in our public schools, a concept she refers to as “quiet corruption”. Patitilo (2012:15) stated that quiet corruption refers to ineffective education reforms at public schools due to teachers who are unwilling to teach because of managerial indifferences or workplace conflicts regarding leadership incompetency which compromises the quality of education at these schools. Patitilo (2012:15-16), argued that this phenomenon occurs more often than bribe scandals, although it does not get as much publicity. She highlighted that many high schools in townships suffer - or are plagued - because of quiet corruption. In terms of this research study, one finds the need to investigate the cause(s) of this mundane and humdrum approach to education at certain public schools. This means that the composition of management at these schools is subject to certain political agendas. Regardless of the policies and the involvement of teacher unions in the recruitment process, a host of scholarly reports accentuate high proportions of crises of maladministration, corruption, intimidations, killing and, most recently, jobs for cash in the promotional appointment process.

On the other side of this argument, the researcher acknowledges the nature of advocacy by teachers' unions for the wellbeing of their members, and the fact that it brings about a positive outlook on the relevance of unions and the role they play in representing teachers in various labour matters. Despite the above-mentioned discrepancies that occur regarding the operational role that unions play within the education system; one recognises the essence of their existence: advocating for the progressive evolution of the education system.

In tackling this research study, the researcher identified two critical interactive points: policy and leadership (entwined with the practical implementation thereof). The researcher will need to determine how the promotional appointment process of teachers work at public schools; this would allow one to gain more context on the influences that bear on the appointment process of promotional vacancies. The researcher will also look at the role of the Department of Basic Education, and the role of the various teacher unions. By employing a qualitative research approach, the researcher will strive to determine what the role of unions are, now that the School Governing Body (SGB) is no longer part of the process when dealing with promotional vacancies, in accordance with the Basic Education Laws Amendment bill: draft of 2017.

Essentially the researcher will need to look at aspects of school governance, school policies and the links between politics – i.e., micropolitics, to be precise - and governance within the basic education system. According to Ball (2012:18), micropolitics refers to the acceptability of strategies by individuals and/or groups from an organisational perspective to use their resources and influence to advance their interests. Considering the definition of Ball (2012:19), this would mean that we are looking at connected aspects of organisational structures such as the intentions and interests of role-players, and the exercising and maintaining of organisational control and conflicts over policy. Ultimately the aim of the research project is to determine whether teachers' unions, by means of the influence they have, can in some way or the other be held accountable for the effectiveness (or lack thereof) of public schools through the appointment of promotional posts.

1.2. Problem statement and rational

1.2.1. Quality education: Merit system vs social justice in cadre

Can South Africa be regarded as a country with one of the best education systems on the African continent? According to Mbiza (2018), teacher-related issues are one of the top challenges faced by public schools. He references a survey conducted by the Southern and Eastern African Consortium for Monitoring Education Quality (SACMEQ), which concluded that 60 per cent of maths teachers for Grade 1 to Grade 6 pupils failed to pass math tests for their grade level. This statistic made headlines across media outlets causing concern over the competency of our

teachers. Other reasons that were identified were matters such as teacher absenteeism, which occurred at high rates. Morris (2018) highlighted the low participation rate of black people in tertiary education. He added that this is a counter-productive element, with regards to advancing what he refers to as “middle-class expansion and demographic transformation”, that remains at a mere 15 per cent for black people, while Indian and white people (aged 20-24) are 49.3 per cent and 52.8 per cent respectively. These results can be attributed to the competency levels of black learners at schools.

To have qualified teachers is paramount in ensuring quality education. According to Savides (2017), school children are being taught by teachers who are not qualified. He quoted the South African Democratic Teachers Union (SADTU) when the organisation admitted that pupils were not receiving quality education in South Africa public schools. Perhaps teaching is no longer a “calling”, but rather an unsatisfying job, just for financial security. Pattillo (2012:14) stated that education reforms have been rendered ineffective at local schools. She goes on to say that tardiness and the lack of effective teaching contribute to the low standard of education.

Furthermore, in an online article, published by the Mail and Guardian, on 27 August 2010, Rousouw, Letsaolo and Mataboge (2010) quoted the SADTU President, Thobile Ntola, who stated that the SADTU refuse to campaign and support candidates who are regarded as thieves or lazy just because they successfully manipulated the ANC’s internal process. She goes on to say “When we changed the leadership in Polokwane, we expected it to change policy. If they are not going to change policy, they must also be changed.” In essence, she stated that newly elected leadership is expected to make much needed positive and progressive changes, and if they failed to do so, they too should leave their positions and allow others who will bring about change, to lead. Ultimately, one can argue that the education system is a notably binary system, where teachers need to teach and be political advocates.

1.2.2. Activism and Leadership

“Put corrupt teachers in jail”. This was a statement made by the ex SADTU official, Mbuyiseni Mathonsi, in 2016 on the ministerial task team which was appointed to investigate the “Cash for Jobs” scandal. According to Khumalo (2016), the investigation on the selling of job opportunities, which was launched by Education Minister, Angie Motshekga, provided a few recommendations on the matter which could be addressed. In 2016 several media outlets covered the issue of jobs being put up for sale, within various education districts. The investigation, which was launched to probe this matter, discovered how many vacant positions were sold for cash payments. The investigation also uncovered that most of these activities were conducted by union members, specifically SADTU members. Regarding this study, the researcher is inspired to investigate

instances where unions exceed their hegemony, especially when there is a reason to believe that administrative processes and managers are of a poxy nature.

The values and aspirations of the group are more important than one's selfish insights. For most of these dysfunctionalities i.e., the tardiness of teachers, inefficacious government strategies, and various other matters of concern at public schools - the media has in recent times resorted to blaming the crises on the SADTU. The SADTU, arguably being the most powerful and biggest teacher union in South Africa, is in alignment with the African National Congress (ANC), the current ruling party. According to Patitilo (2012:16), most SADTU critics hammer on instances where there have been confrontations by SADTU members with those who refused to oblige be, or carry out the mandate of, the union. Patitilo (2012:16) added that although the arguments brought forward by media outlets are assumptions and of an anecdotal nature, one cannot be oblivious to the powerful forces within teachers' unions, considering the role they play in public schools.

Jansen (2001:223) argued that the South African education system is negatively influenced by politicians and bureaucrats who are often misinformed about the conditions of our schools but would rather enforce policies. Jansen (2001:224), argued how learners are caught in the middle of this war between negative politics and diplomatic attempts to improve the education system. There need to be some erudite discussions on matters of leadership and governance within public schools. According to Patitilo (2012:18), literature on education reform suggests that leadership and management at schools serve as a key determinant in the performance of the school. As much as the Departments of Basic Education (DBE) is involved in the appointment of teachers, setting school policies, and other administrative tasks, one cannot be oblivious to the fact that decisions are influenced by external factors that more often than not, are politically driven.

1.2.3. The perspicacity of teachers towards unions.

Unions want bold strides for teachers (Macupe, 2019). This was the headline in the Mail & Guardian, following an interview with the SADTU general secretary, Mugwena Maluleke, on the then anticipated announcement of President Cyril Ramaphosa's cabinet. During this interview, Maluleke voiced his concerns over the poor quality of infrastructures and/or facilities at schools which compromises the dignity of their members. According to Macupe (2009), several union authorities also argued the matter of appointing all temporary teachers into vacant substantive positions.

A lack of reforms in the education sector can only bring about conflict and resistance. According to Zengele (2013:233), teacher redeployment is often regarded as a bureaucratic and political construct, which seems to be becoming a global phenomenon. He argued that this kind of redeployment and/or appointment is aimed at eradicating the redundancies of teachers at schools when learner numbers decline, or when a school is understaffed. Subject to the governing bodies'

recommendation and/or endorsement, as we know it, these appointments should be based on professional qualifications and competencies.

Section 8(2) of the Employment of Educators Act (76 of 1998), which states that redeployment and application for promotional posts may only occur with the recommendation (which may be perceived as approval) of the School Governing Body (SGB), and subsequently authenticated by the Director-General of the Department of Education. Zengele (2013:235) argued that, with this profession becoming even more complicated and requiring a higher sense of professional standards, the purpose of this double validation in the appointment process is to ensure that teachers can function in an atmosphere free of nepotism and discrimination. Professionalism and ethics are instrumental in maintaining the integrity of the process.

Following the killings and protests in Umlazi, KZN, in 2010, we cannot underestimate the extent to which the appointment process is influenced by teacher unions. As argued by Patitilo (2012:20) and supported by Zengele (2013:233), the policies regarding the appointments within promotional vacancies are riddled with corrupt practices and favouritism. They argue that these processes are not based on the democratic values as set out in the Constitution of South Africa (1996) and is substantiated by a lack of meritocracy. This implies that most appointments are based on one's affiliation with the relevant powerhouses and the execution of prescribed mandates, which leave a question mark when it comes to the matter of accountability in the case of malpractices.

1.2.4. Prominent centres of power in the education sector.

According to Masondo (2016a), education in South Africa is a system in a major crisis. This follows a study that revealed unjust influence by teachers' unions, the issue of substandard teacher performance and knowledge and the allocated time for teaching and learning. Without disregarding the representation that unions offer when it comes to labour matters, the article additionally cited how unions are often opposed to national policies and/or initiatives. Another matter that comes to mind is the incompetency of SGB's. Masondo (2016b) argued that these matters interfere with the national education mandate, i.e., to act in the best interests of the learner. He also added that the research indicates the reluctance of teachers' unions to take accountability for their conduct and the influence they exercise on schools by their members.

According to van der Berg *et al.* (2016), any measures taken by the Department of Education regarding the improvement of quality education is in vain if effective learning cannot take place. They argue in the study of identifying binding educational constraints in South Africa, that using the binding constraints approach, with problems being as severe as they are, no amount of money or time will help resolve these problems.

The combination of the Employment of Educators Act (76 of 1998), the Labour Relations Act (66 of 1995), the Employment Equity Act (55 of 1998), allows the provincial Head of Department (HOD) and the SGB's to be responsible for the configuration of the teaching staff at schools. According to Mampane (2009:73), these role players are jointly responsible for the transformation of the school environment. In accordance with the Education Laws Amendment Act (24 of 2005) the State, particularly the HOD, may completely disregard any recommendations done by SGBs regarding the appointment of a prospective teachers.

In October 2017, a new draft bill of the Basic Education Laws Amendment Act (15 of 2011) was approved by the South African cabinet for publication in the Government Gazette for public comments. According to the Department of Education (2017:31), the bill is proposed as an amendment of the South African Schools Act (84 of 1996), as well as the Employment of Educators Act (76 of 1998). The Department of Education (2017:31) argued that this amendment aims to align all developments within the educational sphere as a way of achieving national excellence. One acknowledges that the amendment bill identifies loopholes in the two pieces of legislation that it aims to reconcile. For the sake of this study, however, the amendment that catches the eye more prominently is the one that involves the SGBs. Section 6 of the Employment of Educators Act (76 of 1998), there has been an insertion of Subsection 3(a)(ii), which states that appointments, promotions, or transfers to any promotional post on post level 2 to 4 on the teacher establishment of a public school shall be determined by candidates identified by the Head of Department, in the manner prescribed by regulations by the Minister. This eliminates the role that SGB members would have played in the appointment of promotional vacancies at schools. With the stakeholders in this process being fewer, one needs to re-evaluate the role of teachers' unions in the appointment process, considering their role of advocating and serving as observers on the appointment panel.

In this study, the aim is to study the effectiveness of the appointment process, by considering the influential factors thereof.

1.3 Research questions

For us to see and measure the progress of the education system, we often need to probe into those matters that concern us most. In this instance, aspects regarding the framework (policy) of the appointment process and the implementation (the joint contributors/role-players) thereof need to be evaluated. This allows one to look at underlying factors/agendas such as the politics and/or micropolitics, power (governance) and quality (competence/merit) that ultimately prove to be

inimical to the quality of the overall public education sector and the performance of teachers/schools.

To establish this, the main research question for this study is:

To what extent do teacher unions influence the appointment process of promotional positions at public schools?

The following sub-questions serve as secondary research questions that will facilitate the research process:

- How do the prominent centres of power within the management and governing structures influence the appointment of teachers?
- What is the link between micropolitics and school governance, with regard to activism and leadership?
- How does a merit system advance social justice and equity?
- How do teachers perceive the role of unions and authority in the appointment of promotional vacancies?

1.4. Research aim and objectives

The conceptualization of academic development stands as an archetype for insightful experiences narrated through a deep analysis of institutional paradoxes, ambiguities and incongruities that are vividly illuminated through the outcomes of influential forces of power. One identifies the quality of education as a major concern, and through this research study, the researcher is inspired to decipher the possible factors that contribute to the matter at hand. The researcher also acknowledges the ideal principles on which teachers' recruitment policies are based although the successful implementation thereof is riddled by influential (interfering) factors of teachers' unions. This means that the researcher also aims to investigate the behaviour of teacher unions which seems to be paradoxical to the objectives of set policies.

1.4.1 Research aim

The aim of this research study is as follows:

To determine the extent to which teacher unions influence the appointment process of promotional positions at public schools.

1.4.2 Research objectives

The following research objectives serve to play a vital part in addressing the main research question for this study. Firstly, with the focus being on the appointment of candidates into promotional positions, the concept of quality comes into question. The researcher wants to determine whether the aspect of qualification serves as a variable in impelling the quality of education.

- In the context of this study, the researcher aims to determine whether appointments in the promotional vacancies are based on merit. One looks at this principle from two perspectives: whether those individuals who are appointed into these vacancies are qualified to occupy the positions and the subject of equity and social justice. Being cognizant of these two perspectives, the researcher aims to establish the precedence of both, and whether the outcomes thereof justify the means. This means that the researcher ultimately aims to determine whether the people occupying key positions at schools, are indeed qualified for those positions and possess the necessary attributes that promote progressive and quality educational experiences.

Secondly, the researcher aims to determine matters on management and governance. The success or failure of any system is determined by the forces that manage and/or govern it.

- The aim is to determine who the authorities are regarding the appointment process, by identifying some distinctive entities. Considering that the entire appointment is a process, it is important to determine the value and authority of those who identify as decision-makers.
- The decisions taken/made by these authorities are not always favourable to all parties involved as there is often a degree of bias or a lack of complete objectivity. The general perception is that objectivity is personified through leadership. However, the subject of loyalty and affiliation compromises the principle of objectivity. The study aims to determine whether there is a link between political affiliations and school governance. In this case, the researcher is cognizant of activism against the value of proper leadership.

Thirdly, the aim of this study is to determine the relevance of teachers' unions in the appointment process, without undermining the value of labour legislations.

- Knowing the role of all the parties involved in a process guarantees efficiency. The relevance of each involved party should always be made clear to those who will be affected

by the eventual decision that has been made. However, for the relevance to be determined, one needs to decipher the perspicacity of those involved. Considering aspects of labour legislation, the researcher aims to determine how the role of teachers' unions is perceived. In doing so, the researcher also strives to determine the degree of authority that is exercised by teachers' unions during the appointment process.

Since the dawn of the new democratic South African government, matters on the filling and redeployment of promotional posts have caused célèbre across the education system. The aim of this study is thus to thoroughly investigate the aspects of teacher redeployment and the involvement and influence of teacher unions on the appointment process at public schools.

1.5. Research design and methodology

A detailed analysis of the research design and methodology will be presented in Chapter Three of the study. This research study adopted a qualitative approach that aimed to investigate the phenomenon/occurrence of interest. In this section however, a basic overview of the methodology will be provided to give the reader an idea of what will follow. The literature review on teacher unions is proposed in Chapter Two.

1.5.1 Research design

1.5.1.1 Methodology

As previously mentioned, the study adopted a qualitative approach. The research methodology that was applied was phenomenology. According to McMillan & Schumacher (2014:372), phenomenology is relevant to this study, as the researcher aims to investigate and interpret the experiences of the participants, to understand the meaning of a particular occurrence.

The collection of the data, the literature review and the interviews that were conducted, served as contributing factors to this research process. The researcher needed to establish the trustworthiness of the study by using triangulation.

The theoretical research aimed to address underlying principles that are relevant to the study. The researcher also applied the phenomenology theory, as it inspires to explore the phenomenon of interests that are related to educational matters. Khanyi, 2013:14) argues that the phenomenology can take the researcher on a journey filled with learning experiences as to how teacher unions influence the appointment process of teachers at public schools as well as the quality of education.

1.5.1.2 Philosophical orientation

The research will take on an interpretivist philosophy. According to Nieuwenhuis (2016:60), interpretivism takes the form of an “anti-positivist” paradigm as it serves as a counter-reaction to positivism. This means that the interpretivist is encouraged to approach the research study from a critical and constructivist orientation. This gives the individual the ability to construct meanings by emphasising a certain phenomenon. The philosophy is self-explanatory in referring to interpretivism as the availability of various interpretations of a particular matter. This will ultimately allow the research to make sensible recommendations as to how the study can be improved.

1.5.2 Population and Sampling: Purposive sampling

This study made use of the purposive sampling method. Nieuwenhuis (2016:198), states that purposive sampling is used in special situations where the research is conducted with a specific aim in mind.

The participants of the research will be purposefully selected. Because this study is of a controversial nature, the researcher acknowledges that participants might be reluctant to participate in the study. With approval of the research supervisor, the researcher aims to conduct the research in the North-West province. The ideal would be to select three schools where there’s active unionism and where there was public noesis of disputes related to the appointment of individuals. By means of active unionism, the researcher will select schools where there is distinct representation of a specific union – such as, SADTU, NAPTOSA and/or NATU etc. A selection of 3 (three) Quintile 1 schools in the North-West province will made, where individual interviews will be conducted with staff members of the following interest groups:

- School principals
- Teachers who are part of the academic School Management Team (SMT) as well as SGB and participated in interviews:
- Subject HOD, or
- Deputy principal
- A teacher as a union representative and/or member that is not part of the SMT who participated in interviews
- A member of the school governing bodies – preferably chairperson

The following people will also be individually interviewed:

- A member of the district-review panel (this is an official departmental structure charged with the responsibility of adjudicating on the disputes lodged by aggrieved parties or candidates),
- Total individual interviews: 11

The fact that a teacher is permanently employed, would suggest that the individual went through the full appointment process as stipulated in the Employment of Educators Act 76 of 1998. Interviewing a school principal and members of the SMT, is also important, considering that these positions are regarded as promotional positions that are higher than a Post level 1 teacher position.

Considering this study, where we investigate the influence of teacher unions on the appointment process, the researcher intends to decipher the outcomes thereof, with the aim of ultimately proposing solutions to the improvement of the education system and contributing to the academic metier.

1.5.3. Data collection: Semi-structured Interviews.

The data for this study was collected through semi-structured interviews. According to Nieuwenhuis (2016:93), semi-structured interviews are commonly used to authenticate data that emerges from other data sources. He added that this kind of data collection method allows for continuous probing by the researcher to explore the crux of a particular matter.

The interviews were conducted on an individual basis between the researcher and the participants. The researcher ensured that the interview adhered to the ethical standards of research by emphasising the importance of confidentiality during the process of this study.

1.5.4. Data analysis and interpretation: Coding

According to Nieuwenhuis (2016:116) coding refers to an analytical process of carefully reading through the transcribed data to divide it into meaningful segments, by using symbols, descriptive words, or uniquely identifiable names. The researcher had to understand, then explain how the categories are linked in order to present the data in a comprehensively.

1.5.5. Validity/Reliability/Trustworthiness

Trustworthiness

The researcher aimed to ensure the validity of the study by leaving an audit trail of the decisions and interpretations during the research process. According to Nieuwenhuis (2016:122), validation allows the reader to follow the process to establish whether it meets the requirements of valid research. Because the study is focused on teachers, a request to conduct the research needed to be sent to the Department of Education, the HOD or any delegate, for approval on conducting the interviews in a way and time that did not compromise teaching and learning at that school.

In ensuring the reliability of the study, the researcher needed to be consistent during the classification procedure of the gathered data. During the coding process, the researcher made use of axial coding. According to Nieuwenhuis (2016:118), in axial data, the collected data seeks to identify the explicit connections between the predetermined categories of the data.

According to Lincoln and Guba (cited by Nieuwenhuis, 2016:123), the trustworthiness of a research study is enhanced by the development of an early familiarity with the participants and the participating organisations. He added that well-defined, purposive sampling, detailed data-collection methods, and triangulation also play a vital role in ensuring trustworthiness.

1.5.6. Ethical considerations

Ethics determine the principles through which a project is administered. According to De Vos (cited by Khanyi, 2013:15), ethics refer to a set of principles that are suggested and accepted by individuals as norms that determine one's behaviour. Ethics refer to those rules that set behavioural bearers to maintain the integrity of something. The researcher will be bound to follow the ethical guidelines as set out by the North-West University (NWU). These guidelines include voluntary participation, informed consent, anonymity and respecting the participant's right to privacy, and ultimately confidentiality, in storing the information that has been gathered from the participants of the study.

With regards to this research study, the researcher is cognizant of the social value and the importance of scientific validity, to develop as an academic in the field of Education Leadership and Management. The researcher is conscientious in the process in the sense that the interests of the participants are more important than the interests of the research. There must always be transparency and the advocacy of mutual respect should take precedence and adhere to the guidelines as set out by the Research and Ethics Committee (REC).

1.6 Conclusion

The aim of Chapter One served to provide a brief discussion on the context of the study. The chapter focuses on the background, as well as the rationale that inspired the title of the research study. Further aspects that briefly elucidate the planned execution of the study include the research questions; the research design; and the ethical considerations.

Chapter Two serves to provide a comprehensive discussion and review of the academic literature on the influence of teacher unions in the appointment process for promotional positions at public schools. Thereafter, Chapter Three will focus on aspects of research designs and methodology; the research paradigm; method of samplings; data collection; data analysis; and further information regarding the ethical aspects of the study. The data presentation, which relates to the research questions, will be provided in Chapter Four. Lastly, Chapter Five will conclude the research study by presenting the findings thereof, as well as to provide recommendations for future research endeavours.

Chapter 2: The contextualization of the influence of teacher unions on the appointment process for promotional positions.

2.1. Introduction

Worldwide, the provision of quality education is an outcome of interdependent, collaborative, cohesive and honest efforts of all key education stakeholders. In most instances, the state is obligated to ensure that quality education is delivered to all the members of society. South Africa's education system as we know it, is the outcome of societal contextual determinants. These determinants refer to those driving forces that ask subversive questions from leadership (and policymakers) and inspire them and the general population to address those issues in a manner that strives to enhance the democratic values of our country.

As such, the researcher aimed to decipher these educational constraints from a contextual perspective. Phillip and Ochs (2003:457) stated that the essence of contextual determinants is embedded in the educational approaches and provisions in the local spheres of the country. Thus, the researcher explored the avenues of quality education provision from a social identity paradigm to contextualize the phenomenon of a distorted appointment process. The focus of this chapter is

to determine what influence teacher unions have on the appointment process regarding promotional positions at public schools. The appointment of qualified individuals into the promotional positions is the starting point.

To achieve the overall objective answering of the research questions that guide the study, this chapter intends to address the following aspects. Firstly, the critical importance of providing quality education in the new dispensation based on aspects of school governance: such a review is located within the international and national landscape. Secondly, examining the logic of providing a voice to teacher unions within a set of policies and pieces of legislation in terms of exercising and maintaining organisational control and conflicts over policy. Thirdly, to examine the micropolitics of teacher unions in advancing the interest of their members first, and then that of the state through the ideology of social identity. Fourthly, conclude by providing a synthesised summary of the interesting behaviour of teacher unions when they are pursuing organisational and personal interests. And such a version is provided against the obligation of the state to provide quality education to all.

2.2 The role of promotional positions in ensuring quality education.

The purpose of this section is to determine how the concept of quality education is perceived from a school governance perspective. The researcher believes that the dynamics of school governance has an influence on the quality of education, especially considering how quality serves as an umbrella concept that contextualises the phenomenon of education provisioning. In maintaining the relevance of this research project and ensuring that the reader understands the importance of quality education, the researcher looks at the fundamental concept from the perspective of the SMT and related stakeholders, such as the SGB.

According to Steyn *et al.* (2011:1-2), education can be defined as the phenomenon of learning through a sort of cognitive transaction with the intention of enlightening certain experiences that can be offered in a formal or informal manner. Harber and Stephens (2009) affirmed that quality education can be perceived as a process that involves an astute combination of educational factors that occur internally within the classroom and externally through societal interactions. They suggest that this process is characterised by a mix of educational inputs, teaching-learning processes and the achievement or mastering learning outcomes that serve to equip individuals with competencies that enable them to contribute to society.

Thus, one can argue that quality education focuses on those educational efforts that enable one to measure the knowledge, skills, and values that an individual attains at the end of the so-called educational process, as defined by various authors. The United Nations Educational, Scientific and Cultural Organization (UNESCO) report of 2005 on quality education (2005:30) alluded to how

education should not only develop the emotional and creative capacities but also develop cognitive faculties that can be scientifically measured and verified. This means that quality education serves to empower society on an individual basis with the aim of broadening their perspectives in a way that combats societal inequalities and contributes to national objectives.

For South Africa to address the societal imbalances of the past, strategies need to be put in place to ensure that people have access to the same quality of education. Since 1994, when it comes to aspects of administrative restructuring, the improvement of infrastructure and/or the development of policies government has made appreciable progress regarding the quality of education that most South African learners are receiving (Howie, 2004).

According to Naicker and Mestry (2011:99), the need for a participatory management style in schools serves to facilitate new educational trends. Subsequently, this requires adequate methodologies that aim to address the underlying issues of teacher appointment into promotional positions and how that affects the quality of education offered at schools.

Mkwanazi (2007:9) added that promotional positions are a way of establishing healthy leadership cultures within South African schools, which inspire an organisational climate that is conducive to the continuous improvement of the education system. It is important to note that quality appointments are not only dependent on the interdependence of key educational stakeholders but also on the honest collaborative engagements of these stakeholders. McKinsey (2007:16) affirmed that the quality of education and the school system rests on the quality of its teachers and their contributions as educational leaders.

As occupants of promotional positions at schools, SMT's play an important role in ensuring that educational policies, and the day-to-day operations of a school, occur in an effective manner (Zengele, 2009:63). Maila (2007:694) suggested that human staffing at organisations is vital to quality education. She posits that the proper appointment of quality teachers into promotional positions would lead to the efficient utilisation of available human resources; thus, optimising the use and the output of learners' performances.

The focus of quality education can be perceived from two perspectives. Firstly, according to Maila (2007:694), quality education serves to empower individuals by contributing towards the opened pathways of self-actualization and the broadening of intellectual perspectives. In laymen's terms, this means that education should be a way of equipping people with skills that are at least monetarily rewardable and to improve their cognitive abilities in a way that advances the standard of living. Secondly, Spaul (2015:37) stated that the expansion of quality education serves as a key strategy in alleviating poverty and emancipating the previously marginalised; and advancing global interest. Subsequently, this enables learners and teachers to achieve their full potential and allows citizens - in their capacities as SGB members - to contribute to economic development and benefit

from it in an equitable manner while establishing an education system that is internationally compatible. Thus, quality education is essential to a country and its learner's long-term success as it plays a major role in determining the readiness of learners for the global world (Tucker, 2011).

Although there might be conflicting interests across research fields, Takayama (2016:73) emphasized the importance of international education narratives. He argued that western social knowledge and universalist premises, with regards to global standards, allow one to thoroughly identify those factors, such as the appointment of quality teachers, which contribute to the provision of quality education. According to Mouton *et al.* (2012:1219), other factors include aspects of (low) moral values at schools, community support (or the lack thereof), matters of safety, the detrimental effect of politics at schools, poverty and other related socio-economic factors, and the pressing issue of under-performing teachers at schools.

2.2.1 Quality education in the new dispensation from a school governance perspective

In this sub-section, the researcher deciphers aspects of quality education in a new dispensation by looking at the relevant role players in the appointment process, how they contribute to the provision of quality education and how they are linked to each other. These role-players, however, will be divided into two groups, which will be discussed under separate subheadings. The first group will be referred to as the central role players in education: the DoE and the teachers. The second group of role-players will be referred to as the decentralised role-players.

The wording in this instance is inspired by the fact that certain components of the education system are conducted in a decentralised fashion, which will be referred to as the school's external staff. These decentralised role-players refer to the teacher unions and the SGB's as the reader needs to understand the notion of decentralisation from a broader school-based management perspective.

In analysing education in the new dispensation, we need to understand what the concept means. In the context of this study, the term dispensation refers to a political or religious system that operates in a country at a particular time (Merriam-Webster Inc., 2019). Dispensation also refers to a system of revealed commands and/or proclamations that serve to regulate human affairs. By referring to education in the new dispensation, the focus falls on those educational factors that occurred during the post-1994 (post-apartheid) years. Considering the nature of this study, the researcher probes aspects of participative management and decision-making at a lower level and the origin of authority during the appointment process that eventually contributes to the provision of quality education in the new democratic South Africa.

2.2.1.1 Central role-players in the provision of education

2.2.1.1.1 Quality teachers

In this section, the researcher looks at the importance of having quality teachers and the contribution they make towards the overarching concept of quality education. In determining how a quality teacher is defined, one can decipher the criteria that are used in the appointment process of promotional positions. This would also enable the researcher to determine how this criterion links up with the activities of teacher unions by considering their involvement in the appointment process.

One of South Africa's greatest challenges in the education system, is the production of sufficient and adequately competent teachers across all school subjects and phases, who can provide quality education (Hofmeyer, 2015:3). Hofmeyer emphasised the importance of coming up with strategies that are aimed at improving the quality of our teachers. Robinson (2019) added that poor-quality teachers are instrumental in holding back the education system of South Africa, especially in terms of how teacher standards seem to be a response to the lack of teacher accountability. However, the dynamic nature of education (especially teaching) makes it difficult to accurately determine a useable definition of what a quality teacher is (Wiens *et al.* 2013).

According to Moyle (2005:1-10), quality teachers can be regarded as individuals who through the combination of their accredited teaching acumen, actively work towards producing desired outcomes as envisaged in the prescribed educational policies. Darling-Hammond (2006) and Liberante (2012) added that quality teachers can employ policy guidelines, and classroom practices that lead to significant and tangible effects on students' learning, which are not only measured on an immediate basis, but also in their later years of learning. Stronge *et al.* (2015:249) mentioned that having quality teachers is just as important as having a quality curriculum, as it reflects the quality of governance at the school.

The effectiveness of schools depends on and requires quality individuals as principals, together with management teams that comprehend and fulfil their responsibilities as leaders of the curriculum and are enforcers of good governance practices, promote an organised environment that is conducive for teaching and learning (Van der Berg *et al.* 2011:3). Ahiaku (2019:34) echoed the sentiment in stating that the quality of teachers, and leadership at schools, serves to propel academic work as well as the overall achievement of a school. Asmal and Wilmot (2001:186), mentioned that a key variable in determining the quality of governance and the provision of quality education is based on the formation and/or development of teachers, which evokes certain characteristics that reflect in their commitment towards the objectives of the school.

In a report and discussion paper on the outcomes of the Australian Educators' Union, Darcel Moyle highlighted a few characteristics that contribute to the definition of quality teachers. The researcher believes that these characteristics can be linked to this study in terms of the criteria for the appointment of teachers in promotional positions. According to Moyle (2006:5), the report found that a quality educator has the following characteristics:

- The ability to work as a member of a team in a broader collegial network as well as a high level of communication skills. This characteristic refers to the teacher's ability to function effectively within a school community. She mentioned how this characteristic refers to the teacher's ability to make progressive contributions towards the betterment of the school as an organisation and to serve as an ambassador in the broader community.
- The ability to work in and within a community. Moyle explained this characteristic as one that encapsulates the physical aspect of locality, and the social capacity that teachers occupy. She referred to community engagements and the contextualisation of educational content in a way that serves to advance the educational needs of the community.
- A high level of professionalism and integrity. This characteristic has to do with how knowledgeable a teacher is, specifically in terms of the new developments within the education sector. She also mentioned how this characteristic is influenced by the developmental opportunities in the profession.

According to Beckmann (2013:557), to establish the quality and professionalism of teachers, one starts by looking at their vocational journey and the further developmental opportunities in their careers. He mentioned the importance of university systems; the standards by which teachers graduate into the profession and those platforms/measures that are put in place to ensure that teachers are life-long learners. The objective is to find the best human capital for the teaching profession. As such, considering an individual's qualifications would serve as the basis for measuring the competence of one who is in consideration for promotional appointments.

The expectation is that teachers grow as professionals and that they have the need to learn while they are teaching as this ensures that students receive optimal education, (Keller, 2002:5). Based on the principle of "life-long learning" and professional development, it is expected that teachers receive those opportunities to develop and empower themselves within the profession to contribute to the quality of teaching and learning at schools. According to Keller (2002:2) and Darling-Hammond (1998), the outcomes of active professional development for teachers should yield increased quality and expertise. This level of quality is not only demonstrated through learner outcomes but also by the leadership prowess the school (teachers) possesses.

York-Barr and Duke (2004) stated that the understanding of organisational development and leadership stems from the recognition of teachers' leadership abilities. They added that the

acknowledgement and involvement of teachers at all levels of school management and operations play a role in promoting quality education and brings about a progressive and competitive culture in the workplace and in the broader community.

As was alluded to in the previous discussion; because of the role teachers play in society, it is important that they display and advance the principles of a quality education system. For instance, according to Spoehr (2004:66), school principals maintain an important societal status, thus, the appointment of a principal needs to be thorough and transparent, as the satisfaction and/or approval of the broader community comes into question. What it translates to is that the individual's competency depends on more factors than their qualifications. Spoehr (2004:66) suggested that the requirements for a promotional position be evaluated and that the criteria should include, among others, the individual's degree/qualification, leadership abilities, political sagacity, general management competencies and their degree of resourcefulness to the school. Because teachers are the enforces/administrators of education policies, Kallaway (2007:30) added to the point that the development of teachers plays an important role in upgrading the quality of teaching and learning at schools, subsequently contributing to the achievement of educational objectives. According to the revised Personnel Administration Measures (PAM), teachers who apply for promotional positions should adhere to the following minimum requirements:

Table 2. 1 Minimum requirements for promotional positions

Post	Minimum experience (years)
Principal	7 years
Deputy Principal	5 years
HOD	3 years

Source: Adapted from Employment of Educators Act (76 of 1998) (Chapter B. 2b(ii)).

The quality of the principal and the school management team determines the effectiveness and functionality of the school system (Ahiaku, 2019:34). Ahiaku also suggested that the management team of the school serves as the primary role players in establishing a prestigious climate in the school. According to Hanushek (2013), a positive school climate reflects an effective school management team and is directly linked to effective and quality performance while dysfunctional schools exist because of ineffective school management teams that ultimately yield poor results.

Khuluse (2004:12) mentioned that leadership is an exercise of authority and decision-making. This translates to the fact that individuals who serve on the SMT of a school are regarded as leaders, by virtue of their positions, which grants them formal and legitimate power and/or authority. Khuluse (2004:13) also added that during the appointment process for promotional positions, it is important to consider individuals who will contribute towards the establishment of clear goals and the

encouragement of fellow teachers in utilising resources optimally while facilitating the delivery of quality education.

According to Hargreaves and Fullan (2015:90), the qualitative and quantitative capacity of a teacher, as an instrument of human capital, is determined by their level of reciprocity in the profession. This statement is made based on a teacher's ability to emanate knowledge and information as a subject specialist, and their display of leadership qualities by maintaining trust, building networks, and adhering to the professional norms and standards.

One cannot deny the efforts that have been made to improve teacher training over the past few years. Higher education institutions have taken huge strides in reforming programmes that are based on teacher training and development. Furthermore, the South African Democratic Teachers Union (SADTU's) policy paper on education (2014) alluded to the fact that the state should ensure a balanced framework curriculum, which is not only flexible enough to suit the educational needs at schools, but also maintains a professional standard that grants the teachers the capacity to feel confident in their profession and sets a culture of societal accountability. These measures are a way of enhancing the professional autonomy of teachers in these promotional positions

2.2.1.1.2 The Department of Basic education

According to Du Plessis (2009), the DBE (among other departments) has had to play a major role in abolishing all systematic links with apartheid legislation. In his article, *"How far the South African education system has come."* Du Plessis (2009) mentioned how the department has had to implement policies that were in line with the democratic values of the country. Fiske and Ladd (2004) alluded to how the new government had to do away with racially defined departments and establish a single education system that is characterised by an overarching legal and policy framework. Hartshorne (1999) mentioned how the transformation was important from a perspective of racial and political discrimination as well as class and economic domination, which had served as the norm in the years prior to 1994.

Mouton *et al.* (2012:1212) added that the apartheid system manifested undisguised educational inequalities through sets of policies that aimed to segregate society. They touch on the fact that the educational system was designed to advance the interests of certain ethnic groups in specified capacities. Garson (2006) pointed out how the Bantu Education Act of 1952, for instance, was aimed at ensuring that black people were confined to limited educational opportunities that would keep them in the working class. This was conceptualised through the academic content that black people received and the fact that school was only compulsory from the age of seven until thirteen, subsequently limiting opportunities for further education and career prospects. Whereas according

to Chislom *et al.* (2005) for white people, school was compulsory from the age of seven to sixteen; for Asian and coloured people, from seven to fifteen. Clearly, the point was to limit access to education, which also limited the choices in career paths and participation in the labour market.

According to Ocampo (2004), apartheid policies perpetuated social inequality. This means that in terms of social and economic equality, the reparations will be felt for years to come. Ocampo (2004) mentioned how these inequalities were not only limited to the content that was taught in schools but also the quality thereof; the funding that was allocated to the schools representing the various ethnic groups; and the quality of the teachers working at these schools (which will be discussed in the following section). These factors would directly affect the quality of education that was offered. Jansen (2001) broached how important it was for the democratic government to rapidly transform the school curriculum and related policies as a key strategy. Malada (2010:22) affirmed the importance of redesigning educational policies because of the difference in the quality of teaching and learning at these polarised educational delivery sites.

The DoE serves as the central role player in all educational activities in pursuit of quality education. In determining the various role players in the appointment process of teachers, it is important to identify the exact role of the department in this spectrum of school governance and the provision of quality education. The South African government (2020) described the Department of Basic Education (DBE) as a department that is mandated to monitor the standard of education as well as administer aspects of the provision, delivery, and performance across the entire country. In accordance with Section 7(2) of the Public Services Act, 103 of 1994, the DBE serves as a government department that oversees basic education (including primary and secondary education) in South Africa.

Mansfield-Barry and Stwayi (2017:77-78) stated that the minister of basic education is a representative of the DBE. They added that this individual is responsible for the governing of schools from a national level through a set of policies that are implemented with the aim to improve the education system of the country. Furthermore, according to the South African Schools Act, 84 of 1996, the HOD refers to the individual who is appointed as the head of a provincial education department, as delegated by the education ministerial committee. This individual would, according to policy, be the person who makes the final appointment of a teacher according to the prescribed guidelines that serve to promote the constitutional values of South Africa. In this regard, the quality of the appointment process (as well as the appointed individual) serves to ensure that a suitable platform is set for the provision of quality education. This is because the DoE represents the state, which is obligated to provide quality education to all, albeit in the main form of policies. The disjuncture in the implementation of policies will be discussed at a later stage. However, it is important to understand how the provision of quality education is ensured through policies that are applied via the following channels:

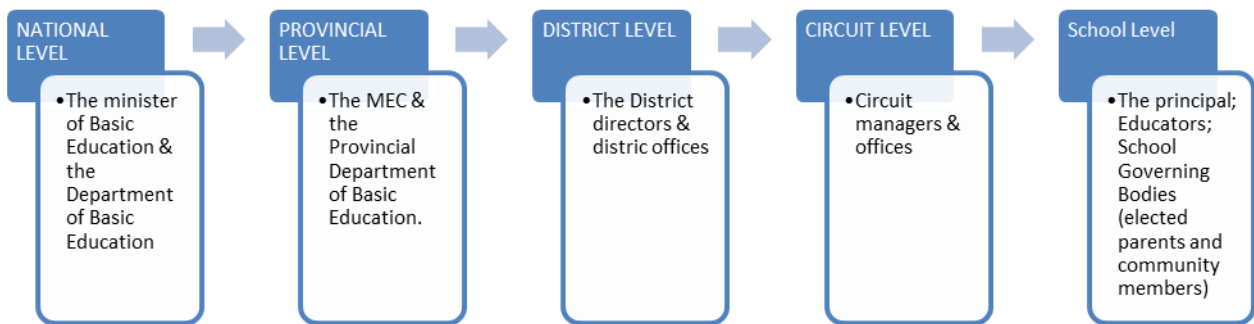


Figure 2. 1 Policy channels

Source: Adapted from: Mansfield-Barry and Stwayi (2017:77)

According to Chisholm (2004:111) the DoE played an instrumental role in promoting social change, especially after the 1994 democratic elections. The following set of legislative policies serve as an example of how the DBE plays a role in the provision of education by regulating teacher appointment processes, which serves to ensure the provision of quality education to all learners:

2.2.1.1.3.1 The National Education Policy Act (27 of 1996)

In accordance with the National Education Policy Act 27 of 1996, the preamble highlights the importance of this policy as one that is used by the Department of Education (DoE) to facilitate the democratic transformation of the national system for education. It also states that this policy is meant to transform the education system into one that advances the interests of all South Africans by upholding their fundamental rights.

Van der Berg *et al.* (2016) mentioned how the DBE has taken various measures to improve, and to enable access to quality education in the country. Thus, the promulgation of the National Education Policy, which is a replacement for the National Policy for General Education Affairs Act of 1984, served as a point of reference for all education legislation. Furthermore, Section 2 of the National Education Policy Act, 27 of 1996, propound the following objectives:

- That the minister can determine national education policy in accordance with certain principles;
- To undertake consultations prior to the determination of policy, and to establish certain bodies for the purpose of consultation;
- The publication and implementation of national education policy; and
- The monitoring and evaluation of education.

Regarding the appointment of teachers, Section 3(3) of the National Education Policy, alludes to how the minister may delegate his/her authority to others when required. The delegation of authority includes matters of school governance such as the appointment of teachers. Section 3(4) states that the minister can override provincial legislation if it is conflicting with national legislation. The considerations made in the latest draft bill by the DBE on the aspect of SGB's authority to make recommendations during the appointment process is strongly substantiated by the proclamation in Section 3(3) of the Nation Education Policy. The draft bill is to be discussed later in the chapter.

2.2.1.1.3.2 *The Employment of Educators Act (76 of 1998)*

The Employment of Educators Act, 76 of 1998 declares that this Act serves to regulate the conditions of service, discipline, retirement, the discharge of teachers, and other employment-related matters. According to Beckmann (2013:557), policies have the nature of asserting the status of teachers. He alluded to how policies determine the rules that describe the rights and duties of teachers, particularly with regards to their employment and the subsequent impact it has on the overall quality of education. As such, determining the minimum requirements for a position serves to establish a meritorious standard by which candidates are measured, to maintain a balanced personnel structure. These requirements are to be discussed in the following section.

For the sake of deciphering all the role players in the appointment process of teachers, the researcher finds it important to highlight the relevance of Chapter 3 of the Employment of Educators Act 76 of 1998, as it discusses matters of appointments, promotion, and the transfer of teachers. In section 6(1b) it is declared that the responsibility of appointing, promoting, and transferring any teacher remains that of the HOD at the provincial level provided in accordance with Section 3(a), that such an appointment be made on the recommendation of the SGB. The subject of the SGB making recommendations will be discussed in the section on decentralised role-players.

2.2.1.1.3.3 *The South African Schools Act (84 of 1996)*

The South African Schools Act 84 of 1996 (SASA), is a policy that stands at the epicentre for the provision of quality education for all and the empowerment of communities through cooperative school governance. As such, the policy aims “to provide a uniform system with regard to the

organisation, governance, and funding of schools.” Furthermore, as promulgated in the preamble, the enactment of the Schools Act 84 of 1996 serves to establish the commitment of a democratic government to:

- eradicate historical racial inequalities and segregation by virtue of the achievement of democracy in the country;
- affirm the country’s need for a new national system for schools that will redress past injustices in the provision of education;
- provide and promote an education system that is of progressively high quality for all learners;
- contribute to the expungement of poverty and other related issues, and the economic development of society; and
- uphold the rights of all learners, parents, and teachers, and promote their acceptance of responsibility for the organisation, governance, and funding of schools in partnership with the state.

According to Cadwell and Spinks (1998:5), under the philosophy of decentralisation, the SASA creates a platform for the self-management and cooperative governance of schools. This is affirmed through Karlsson *et al.* (2001:141) who added that decentralisation enables the broader community to contribute to the management of the school and subsequently play a role in the quality of education that is offered at the school.

In terms of the appointment process into promotional positions, the SASA plays an important role in providing context on the relationship between lay governors and school-based management teams (Bush & Heystek., 2010:127). They added that the SASA is important as it conceptualises the separation of matters concerning governance and professional management within schools.

2.2.1.1.3.4 *The Labour Relations Act (66 of 1995)*

As it is with most structures in the professional service sector, the DBE is subject to the legislative frameworks that are set out in the LRA (66 of 1995). In accordance with Chapter 1(1) of the Act, the purpose thereof is to advance economic development, social justice, labour peace and the democratisation of workplaces. This Act sets the guidelines for all labour related matters between employers and their employees. The Labour Relations Act also serves as a point of reference in the discussion of role players in the provision of education, from the perspective of teacher appointments.

Chapter 2 of the Act focuses on aspects of freedom of association and general protections. This chapter is of relevance to this study as it introduces us to the role that teacher unions play. In accordance with Section 5(1)(2) the LRA, which states that no employee may be discriminated against for exercising their right as conferred by this Act nor can one be discriminated against for belonging to a union or taking part in any subsequent form of unionism.

In this regard, according to Schneider (1999:521) (cited by Zengele, 2009:25-26) participatory governance, with the inclusion of unions at schools, can have an impact on the level of transparency and the disclosure of information, which ultimately influences the decision-making processes.

2.2.1.1.3.5 *The Employment Equity Act (55 of 1998)*

At this point, we understand that the Labour Relations Act 66 of 1995, focuses on promoting principles of democracy and inclusiveness in all labour related activities. The Employment Equity Act 55 of 1998, is a policy that supplements LRA, as it aims to address the imbalances within the workplace. In the short title of the EEA, it is indicated that the primary objective is to restore and redress historical imbalances that are inspired by discrimination.

According to Coetzee (2001:300), despite policy-based efforts to curb workplace discrimination, the transformation within workplaces can be attributed to a deep-rooted culture of patriarchy within society. She brings forward the argument that patriarchal discrimination is strongly connected to the ideological status of the system. This point is relevant to the researcher's later discussion on the influence of social identities. Coetzee (2001:303) also alluded to how leadership at schools is dominated by male figures, and that the capability to occupy a leadership position is often determined according to one's gender or other related biases.

The preamble of the EEA acknowledges the fact that inequalities create disadvantages for certain categories of people, and that this cannot simply be redressed by repealing discriminatory laws. Furthermore, the preamble of the Act, ascribes the disparities within the labour market with regards to employment, occupation, and income to discriminatory laws and practices of the past. Thus, the objectives of the Employment Equity Act, especially in the context of this study, are:

- to promote the constitutional right of equality, and the exercise of true democracy
- to eliminate unfair discrimination in employment
- to achieve a diverse workforce broadly representative of our people; and
- to ensure the implementation of employment equity, to redress the effects of discrimination.

The inappropriate involvement of unions by often ignoring their observer status during the interviews is a controversial subject in the appointment process (Zengele 2009:7). Zengele added that this kind of involvement may lead to the infringement of teachers' rights if it is not properly addressed by the DoE. However, considering the representative nature of teacher unions, one can argue that by virtue of the Employment Equity Act, these unions are merely ensuring that equity is applied through their advocacy for a specific candidate during the appointment process.

Ultimately, in accordance with Chapter 2(5), employers are encouraged to take steps that promote equal opportunity in the workplace by eradicating policies or practice that advances unfair discrimination. Although Section 6(2)(a) and (b), makes provision for instances of fair discrimination, this section of the Employment Equity Act affirms that discrimination may take place in instances where affirmative action is applied, or where there is a justified reason for the exclusion or preference for any person based on an inherent requirement for a job.

2.2.1.1.3.6 *The Education Laws Amendment Act (24 of 2005)*

The researcher is of the opinion that the Education Laws Amendment Act 24 of 2005 is of relevance to this study as it serves to indicate amendments made to the Employment of Educators Act of 1998. In accordance with the Education Laws Amendment Act, the aim of the policy serves to make provision for the refinement of the appointment process of teachers. This is with specific reference to the procedures that schools follow, and the criteria that are used in the selection of candidates for specific posts.

2.2.1.1.3.7 *Basic Education Laws Amendment Bill (the draft Bill) of 2017.*

The draft Bill, as proposed by the minister of Basic Education, Angie Motshekga, and approved by cabinet proposes to amend both the SASA (Act 84 of 1996), and the EEA (Act 76 of 1998). In accordance with Section 2(10) Clause 10, the draft bill serves to amend Section 20 of the SASA by limiting the powers of the SGB in making recommendations concerning a candidate for appointment. The Bill suggests that approval thereof will mean that the SGB can only make recommendations on the appointment of post level 1 teachers, and not post levels 2 to 4, as that will be the sole responsibility of the Head of Department (HOD).

This specific policy plays an important role in this study as it allows one to decipher the relevance of the roles that SGBs and teacher unions play in the appointment process under the philosophy of decentralisation in the provision of quality education.

Essentially, the proposal of the draft Bill serves to take away the authority of SGBs to appoint teachers into promotional posts. This means that SGBs cannot appoint school principals, deputy principals or departmental heads (DH). According to Masuku (2020) by stripping SGB's of the authority to make promotional appointments, the DBE intends to address matters of corruption that occur during the appointment process.

It is important to note that during the writing of this research study, the draft Bill is yet to be accepted. This means that the researcher will refer to the Bill from a hypothetical perspective. Thus, one will look at the possible implication this draft would have if it were to be accepted.

2.2.1.1.3.8 *The Revised Personnel Administrative Measures (PAM) as amended in 2016*

The personnel administrative measures as set out in the Employment of Educators Act, provides information regarding conditions of service, as well as matters of employment and promotions concerning teachers. For this study, and in answering questions on the minimum criteria for the appointment of a teacher into a promotional position, the following is of importance:

Experience requirements for teachers as stated in the Revised Personnel Administration Measures.

Table 2. 2 Experience requirements per post

Post	Minimum experience (years)
Principal	7 years
Deputy Principal	5 years
HOD	3 years

Source: Adapted from Employment of Educators Act (76 of 1998) (Chapter B. 2b(ii))

2.2.1.1.4 The partnership between the Department of Basic Education and professional statutory bodies.

2.2.1.1.4.1 *The Education Labour Relations Council (ELRC)*

The ELRC serves as a statutory body that provides a formal platform for government and teacher unions to deliberate and/or negotiate on policies at a national and provincial level, which are aimed at managing the role and performance of bureaucracies. (Levy *et al.*, 2018:71). This means that the ELRC has the duty of serving as a body that manages aspects of collective bargaining within the basic education sector; thus, promoting the maintenance of labour peace (ELRC, 2021). Mothata, Lemmer, Mda and Pretorius (cited by Zengele & Coetzer, 2014:17) further explained that the ELRC serves as a policy-making structure, which consists of government and teacher union representatives. These representatives according to the ELRC are indicated as follows:

- The employer, who refers to the collective that comprises the provincial departments of education as mandated by the Department of Basic Education.
- The teacher unions, which include:
 - SADTU (South African Democratic Teachers Union);
 - CTU-ATU (the Combined Trade Union of Autonomous Trade Unions), which consists of the following unions:
 - National Professional Teachers Organisation of South Africa (NAPTOSA)
 - Suid-Afrikaanse Onderwysersunie (SAOU)
 - National Teachers Union (NATU)
 - Professional Educators Union (PEU)
 - Public Servants Association (PSA)
 - Health and Other Service Personnel Trade Union of Southern Africa (HOSPERSA)

According to Zengele and Coetzer (2014:18), the ELRC played a major role in establishing the Collective Agreement No 2 of 2005. They added that this policy paper alludes to the role of teacher unions during the filling of promotional posts. Mosoge and Bipath (2008:118) stated that the ELRC affirms the role of unions in ensuring that proper procedures are followed during the appointment process, with the overarching duty of advancing fairness and non-discrimination, as envisaged in the collective agreement.

In terms of the appointment process, the SASA (84 of 1996) declares that an interview committee needs to be established. This committee would serve to do the shortlisting of candidates with the objective of making recommendations. In accordance with the ERLC (2003:77) the interview committee consists of the following persons:

- A departmental representative, who serves as an observer and resource person. This can also be the school principal;

- The principal of the school, in the instance where they are the applicant, and not the departmental representative;
- Members of the SGB, excluding teacher members who are applicants for the post; and
- One union representative per union that is part of the provincial chamber of the ELRC. This union representative serves as an observer in the process of shortlisting, interviewing and the formulation of the recommendation list. The aspect of teacher unions maintaining an observer status will be discussed later in the chapter.

Finally, according to the ELRC (2003:77), records of the appointment process of teachers and all relevant information should be sent to the unions. These records should have an indication of the date, the names of all attendees and their affiliate constituencies, as well as proof of invitations and transmission of appointment-related information (Department of Education, 2007:8-9).

2.2.1.1.4.2 South African Council of Educators (SACE)

According to Du Plessis (2013:19), the SACE serves as a statutory professional body that was established in terms of the South African Council for Educators Act, 31 of 2000. Mosoge and Taunyane (2009:1) added that the SACE serves to enhance the degree of professionalism among teachers. It is also worth mentioning how the SACE is mandated with registering teachers and propagating a professional code of conduct that promotes the professional development of teachers in South Africa (SA, 2000).

The inception of the SACE served as a major milestone in the provision of quality education in the new dispensation (Mosoge & Taunyane: 2009:3). Mosoge and Taunyane echoed the fact that SACE played a vital role in putting an end to pre-1994 educators' councils which were racially and culturally divided. They applaud the promulgation of the South African Council for Educators Act, which served to advance the democratic principles of equality and redress with the purpose of providing quality education for all.

It is important to note that the SACE does not play a direct (if any) role in the appointment process of teachers. According to Zengele and Coetzer (2014:18), the SACE only comes into question when there is a need to determine whether a candidate is registered or qualifies for registration as a teacher with the SACE.

Clause 10 of the draft Bill of 2017 proclaims that the proposed amendment is necessitated by the importance of attracting competent persons to become principals and members of school management teams, thus, promoting the importance of good leadership and management in the provision of quality education. According to Masuku (2020) the approval of the draft Bill and the further empowerment of the department will substantiate SACE principals and prevent disruptions of schooling due to appointment-related disputes and the reduction in corrupt activities during the appointment process.

2.2.1.2 Decentralization of education: The role of external staff.

In this section, the researcher deciphers aspects of decentralisation from the perspective of school governance, particularly the appointment into promotional positions and how it contributes to the provision of quality education. According to Van der Berg *et al.* (2011:12), the continuous support amongst stakeholders across the education system, and the strengthening of relationships serve to promote effectivity and progressiveness in the provision of quality education at public schools. Xaba (2004:313) mentioned how the involvement of stakeholders in the running of the school, and especially in the appointment of teachers, has advanced the phenomenon of democratic governance. It is also worth mentioning how the advocacy for democratic governance by the South African Schools Act 84 of 1996 puts a lot of emphasis on the aspect of decentralisation in the education system (Xaba, 2004:313).

According to Marishane (1999:78), the term, decentralisation refers to the idea and belief that an organisation - or in this context, a school - cannot be governed and/or managed on its own. Marishane stated that authority should be shared, if not delegated to various stakeholders, or those that have interests in the school in the form of a partnership. Gavin and McGrath-Champ (2017:1-2) added that the devolution of authority from government control to local school level allows schools to have greater power to shape their structure and determine educational outcomes; thus, having the authority to appoint teachers in those key positions allows schools to determine their own organisational culture. Marishane (1999:79), further argued that this decentralised approach would ensure healthier relationships between schools and their immediate communities, especially with regard to accountability systems and the monitoring of bureaucracies.

For one to be able to identify bureaucracy within an organisation that consists of various stakeholders, one needs to understand that a decentralised system brings about aspects of accountability and decision-making power (authority) at various levels. In the context of appointments into promotional positions, one needs to decipher who the real decision-makers (or rather, figures of authority) are, the nature of their authority and the extent to which they can be held accountable. According to Lello (cited by Maile, 2002:326), accountability necessitates for one to be answerable to other stakeholders in the organisation. Beckman (2000:08) explained accountability as the exercising of power and the use of resources in the management of a school. However, despite a decentralised management system of the school, the hierarchical nature thereof causes a disjuncture between authority and accountability especially when the needs of the community (the SGB), and the political affiliates need to be taken into regard.

Maile (2002:326), suggested that the notion of accountability often sparks a lot of power struggles within schools. He alluded to how principles were the main decision-makers in the past as opposed to the new dispensation where SGBs have been given a bigger say in management decisions, and

the recent prominent involvement of teacher unions. Consequently, the shift in the balance of power strives to eliminate rule-driven and bureaucratic accountability in the provision of education. (Skweyiya, 1995:40).

Squelch (2001:140) contends that school governing bodies have the moral obligation to act in good faith; thus, they act on the premise of protecting the interests of the school. This means that a schools' SGB should prioritise and maintain a high standard in the appointment of teachers and the provision of quality education. This coincides with the DoE's (1995:32) position that stakeholders have the right to comment on and make suggestions in the domain of professional staff. Sayed (1999:142) contends that considering the political history of South Africa, educational decentralisation can be viewed as a measure to enforce greater over control of schooling by those who pay for it to enhance efficiency, effectiveness, and quality. In this context, the definition is formed on the principle of "consumer power" during an era where model school concepts were politically enforced.

Teachers' unions, on the other hand, also weigh in heavily on aspects of teacher appointments and the provision of quality education. The SADTU declared in its policy paper on education, which was published on 9 September 2014, that the importance of quality education cannot be underestimated and that teachers should be trained and qualified appropriately. This policy paper is of importance, as the researcher acknowledges the SADTU as one of the pioneers in education reform in South Africa, post-1994. According to Kgari-Masondo *et al.* (2019:92), the knowledge and understanding of teacher unions, in terms of democratic governance, allows the union to challenge the relevant structures of government and school governing bodies, on specific educational issues, in order to promote quality education.

Ultimately, according to Brown *et al.* (1998:4), a decentralised approach in aspects of school governance serves as a method for improving educational processes and expanding the range of accountability across the school community. They added that decentralisation strives to achieve collegial and collective management at schools. This means that the needs and ambitions of the community can be catered for provide that those who hold the authority are well equipped and that roles are clearly defined. In response to this study, Burki *et al.* (1999) believes that educational decentralisation serves to determine the impacts of local autonomy and community participation and the outcome thereof on the quality of education provided at schools

2.2.1.2.1 School Governing Bodies (SGB)

In accordance with Section 16(1) of the SASA (84 of 1996), a governing body is a statutory body of people who are elected to govern a school. Bush and Heystek (2003:127) stated that the

justification for governing bodies lies in the link with the wider democratic objectives in the advice to school governors. This means that there's an underlying philosophy of participation, which is ultimately beneficial for the school and its pupils, and the community it serves. Reeves (2002, xiv) added that the provision of quality education is based on a collaborative and participatory process of engagement. Thus, by virtue of the appointment processes, the aim is to identify those interdependent components that adopt pragmatic approaches towards educational problems. Thus, according to Beckmann and Prinsloo (2009:171), SGB's personify the ideology of decentralised power in the South African school system. The SASA 84 of 1996 advocates for partnerships and mutual responsibility for education and the governance of schools.

In this regard, Caldwell (2005:1) described school-based management as the systematic decentralisation of school levels of authority and responsibility. In this sense, he alluded to the impact of decentralised decision-making on significant matters related to school's operations, within the scope of clear policy frameworks, educational objectives, and quality. According to Looyen (2000:20), decentralisation and the delegation of authority serve as a reform mechanism, which has an influence on processes involving the quality of teaching and learning. Glen (2000:178) contends that the extent of the SGBs authority in the appointment process of teachers serves as a good indicator of democratic governance within schools and the establishment of a community-driven organisational culture. This organisational culture, as Hogan and Coote (2014:1609) contend, refers to an anthropological phenomenon that reflects the behaviour and the management of the school.

Murphy (1992:35) suggested that a lot of educational shortfalls that schools experience can be avoided if schools apply governing strategies that embrace the expertise of the local community. The involvement of parents in the governance of schools, serves to ensure that the school provides services that reflect the needs, aspirations and hopes of the community (Looyen, 2000:19). Looyen also alluded to how schools become more effective in addressing local needs when they apply governance/management strategies that advance the ideals of democratic governance. As such, in terms of the appointment process of teachers, the Employment of Educators Act 76 of 1998, prescribes that the appointment, promotion or transfer of teachers only be made on the recommendation of the SGB.

According to Van Wyk (2004:49), the SGB is tasked with making recommendations on the appointment of teachers to the HOD of the province. She also stated that the SGB has the duty of dealing with disciplinary matters involving teachers. They also need to support the principal, teachers, and other staff members in performing their professional duties. The researcher contends that the ability of the SGB to make recommendations on the aspects of the appointment process and their involvement in other professional matters, not only display their authority (power) on matters of school governance but it also affirms the ideals of transparency and democratisation

in the provision of quality education. In affirming this statement, Creese and Earley (1999:36) suggested that the involvement of the SGB has a direct impact on teaching and learning when they appoint staff members. The DBE acknowledges the possibility of any discrepancies occurring in the appointment process, as provision is made by the ELRC. The ELRC (2003:5), proclaimed that the HOD may decline teacher appointment recommendations from SGBs on the following grounds:

- (i) any procedure collectively agreed upon or determined by the minister for the appointment, promotion or transfer has not been followed;
- (ii) the candidate does not comply with any requirement collectively agreed upon or determined by the minister for appointment, promotion, or transfer;
- (iii) the candidate is not registered, nor qualifies for registration as a teacher with the South African Council of Educators;
- (iv) sufficient proof exists that the recommendation of the said Governing Body was based on undue influence; or
- (v) the recommendation of the said Governing Body did not give regard to the democratic values and principles referred to in respect of the appointments and the filling of posts.

In 2017, the minister of basic education, Angie Motshekga, proposed a new draft Bill that aims to limit the authority of SGB's. As stated in the previous discussion, the proposal of the draft Bill serves to take away the authority of SGBs to appoint teachers into promotional posts. This means that the SGB cannot appoint school principals, deputy principals or departmental heads as indicated in the SASA.

Following an interview with the South Coast Sun, Education Activist Hendrick Makaneta (2020) lauded the minister of basic education for her proposal. According to Makaneta, one of the biggest contributing factors for South Africa's poor education system is the high involvement of educationally ignorant people who are given decision-making responsibilities that affect the entire public-school system. He added that the Bill will be vital in eradicating corrupt practices where SGB's misuse their powers to favour their cadres, and those instances where SGBs have authority but lack the necessary knowledge on aspects of teaching and learning.

In recent studies, many concerns regarding the capacity (or lack thereof) of SGBs have become the talking point when it comes to the appointment of teachers and the implementation of educational policies. According to van Wyk (2004:50) the government recognises that many SGBs do not have the required skills and experience to exercise their new powers and often have trouble in fulfilling their duties. Zengele (2009:63) echoed the sentiment of the then secretary general of the SADTU, Thulas Nxesi in saying that any efforts of reforming the education system have been undermined by the powers afforded to SGBs as they lacked the necessary management acumen to be involved in crucial decision-making processes at schools.

Section 19 of the SGBA 84 of 1996, proclaims that provincial governments are obligated to provide training for SGBs. The SGBA advocates for a sophisticated form of democratic school management which is determined by the competencies of school governors (Tsotesti *et al.*, 2008: 387). They added that the ability of the SGB to govern schools depends on their skills, knowledge, and experience of governance. Therefore, van Wyk (cited by Xaba, 2011:201) suggested that providing these parents with the required educational background would build a framework for school governance that is characterised by power-sharing among equally informed stakeholders of the school. According to Disterer (2001:5), a good way to foster the transferring of knowledge is through community development. He argued that more networking platforms should be created, and workshops should be held that promote parent involvement and informed decision-making by SGBs.

Heystek (2010) contended that the inadequate training that SGBs receive, has an influence on how they fulfil their roles as co-governors of a school. This often causes a subordinate culture between the teachers and the SGB. Zengele (2009:63) suggested that the efficacy of an SGB is often determined by the cordial relationship between the chairperson and the principal of the school. He added that the leadership qualities of the chairperson and the collegial nature between the SGB and the principal determine the climate at the school and the confidence in their capacity to make decisions that are in the best interest of the school, especially regarding the promotional appointments of teachers.

Mncube and Mafora (2013:16) alluded to the fact that in recent times, the actions of SGBs have not been a positive reflection of the principles envisaged in the ELRC. Ramontsha (2019:6) suggested, that the involvement of SGBs, in the appointment process has probed incidents where teachers have been promised promotions based on their association with members of the SGB, a compromised selection of panel members, who are endorsed by forces within the community to manipulate the system and list of recommended prospective candidates; and the disputes that arise when a candidate is appointed. Van Wyk (2004) suggested that SGBs would even appoint candidates who they deem appropriate to occupy management positions at the school in a predestined fashion.

According to Beckmann and Prinsloo (2009:173) the DoE, has in recent times cautioned SGBs against their over-involvement. Beckmann and Prinsloo (2009:174) also touched on how steps have been taken to limit the involvement and powers of stakeholders, such as the SGB in the appointment of staff. In accordance with Section 6(3)(b) of the Employment of Educators Act 76 of 1998, SGBs are encouraged to comply with the principle of fairness, equity, redress, and representation.

The recently proposed draft Bill, however, serves as a strategy by the DBE to eradicate corrupt practices and the misuse of power by SGB members (Mzwangwe, 2020). According to Makaneta (2020) the Bill is an important way of addressing instances where SGBs flex their powers to favour their cadres to maintain territorial dominance in the education sector. He referred the numerous reports on instances where unions acted beyond their capacity as observed during the appointment process.

2.2.1.2.2 Teacher Unions

2.2.1.2.2.1 *Brief overview*

Myburg (1999:25) identified the formation of trade unions as far back as 1894 in Europe. These unions served to protect skilled workers from being exploited in the industry. Myburg (1999:7) added that unions were deemed to be illegal in most countries in Europe and in the United States of America (USA), China, and India. He alludes to how the state would prosecute anyone who attempted any form of unionising. Despite this, unionism continued to grow and gradually gained political influence within workplaces. Potenza (2000) affirmed that the narrative behind the formation of trade unions was based on the improvement of working conditions, communication and having a body that would represent workers by advocating for common policies that advanced progressiveness in the labour sector.

Heystek and Lethoko (2001:223) referred to the establishment of the first teacher union in 1879, which was known as the Native Educators Association (NEA). Myburg (1999:7) mentioned how the NEA managed to voice their dissatisfactions on unpleasant matters in the workplace, despite the legal ramifications. He added that despite the effects of pass-laws on teachers, these issues included major discrepancies in salaries between white and non-white teachers.

The genesis of teachers' unions in South Africa occurred in 1940 when two associations, known as the Cape African Teachers' Association (CATA) and the Transvaal African Teachers' Association (TATA), were formed (Heystek & Lethoko, 2001:223). According to Zengele (2009:38), teachers' associations did not constitute unions, even though they spoke out against unjust government policies, especially policies that were enforced during the apartheid years. According to Reeves (2000:67), the objective of these teachers' associations was to rally teachers and parents to boycott an oppressive and authoritarian education system.

Reeves (2000:67) alluded to how labour movements in the education sector were inspired by the inequalities and unfavourable circumstances that left teachers with large numbers of learners to teach, and inefficient salaries or no salaries at all. Dekker and Lemmer (1993:362) suggested that

apartheid educational legislation served to tyrannize black people, instead of ensuring the provision of quality education for all races.

According to Zengele (2009:41), promoting politics at schools was heavily condemned in 1978 to an extent where this kind of transgression led to expulsion. The researcher considered this as important considering how 1976 became the catalyst year for the dismantling of oppressive policies, particularly in the education system. Christie (1992:261) contended that major developments regarding teachers occurred for political and educational reasons.

Chisholm (2012:95) mentioned the distinct teacher's movements in South Africa that emerged, namely: the *Suid-Afrikaanse Onderwys Unie* (SAOU) whose main membership sphere consisted of Afrikaans speaking teachers, the National Association for Professional Teachers' Association (NAPTOSA) that came about during the early years of apartheid; and the SADTU that came into existence after some internal opposition emerged during the years leading up to the 1994 democratic elections. Zengele (2009:56) explained how the differences between the SADTU and the NAPTOSA, as organisations was primarily based on race. Leadership within the NAPTOSA were exercised by white teachers even though most of the members in the union were black. The SADTU on the other hand, was a locally based organisation that later became a trade union with oppositional movements that had the primary mandate of eradicating exclusive racial ideologies.

2.2.1.2.2.2 *Contribution towards quality education and the appointment of promotional posts*

According to Kerchner and Mitchell (1998:23), teacher unions have asserted themselves as prominent figures in the provisioning of education in the new dispensation. Mosoge and Taunyane (2009:181) mentioned that an increase in unionising started influencing the landscape of public education and the quality thereof. They highlighted unionism as the movement that influences teachers to take on policy initiatives as proposed by the government and to safeguard the interests of all stakeholders in that regard. Moe (2001:43) substantiated that teacher unions aim to improve the quality of education, which suggests that they look after the interests of teachers and contribute to the subsequent improvement in quality education.

According to Hindle (2016), teacher unions play a vital role in advocating that teachers receive professional development as a basic condition of service. He referred to instances where unions took intervention measures to address aspects of scarce skills in the education sector by providing platforms for professional development. According to Mafisa (2017:10553), teacher unions should play a meaningful role in education, not only about bargaining for teachers but also in ensuring

quality education by means of improved teacher approaches and by maintaining high standards. Du Plessis (2013:15) contended that the contribution towards transformation programmes such as the white paper policy that served to align mainstream and special needs schools was one such policy, which would eventually advocate for an equal and constitutional education experience for everyone.

Smith and Schalekamp (1997:4) stated that one of the objectives in education should be to restore the culture of teaching and learning through developmental programmes that promote inclusivity and enhance professionalism. In this regard, teacher unions play a big role in improving the outlook of teachers towards the profession and collaborate with training institutions in the development of programmes that equip teachers with the necessary skills, which serve to address modern-day educational issues.

Souden (2001:33-40) advocated that the promotion of teacher professionalism serves as a positive contribution towards the education sector and the quality of education. He mentioned that despite the different narratives of teacher professionalism, from the different provinces and schools, the perspective of teacher unions, in this regard, vindicates their involvement in most educational activities. Even though teacher unions cannot necessarily shape or alter the learners' performance, they can influence the effectiveness of schools, which serves for the betterment of the schools and overall learner performance (Mafisa, 2017:10558). According to Fredrickson, (cited by Mafisa, 2017:10558), unions can contribute towards teacher development and professionalism by promoting interest among teachers to improve the quality of services they render, by cutting unreasonable teacher absenteeism, and by attracting projects that will improve projects and/or initiatives that improve the quality of education.

According to Heystek and Lethoko (2001:225), the SADTU promotes teacher professionalism by addressing matters related to the working conditions of teachers as well as achieving bargaining power which allows them to influence educational activities. Heystek and Lethoko also alluded to the NAPTOSA who found their idea of professionalism as one that is principled by putting the child first. The NAPTOSA also emphasises on their website¹, the importance of maintaining the professionalism of their members and contributing towards the development of education legislation.

When it comes to the appointment process of teachers into promotional positions, the role of the union is regarded merely as one of the observers. In accordance with the Employment of Educators' Act 74 of 1998, it is declared that in terms of the redeployment and transferring of teachers, teacher unions are regarded as mere observers and not participants in the appointment process of teachers. According to Zengele (2009:10-11) teacher unions are responsible for

¹ www.naptosa.org.za

ensuring that teachers are not victimised during filling of promotional posts. He mentioned that the presence of the union, and their advocacy for fairness, serves to ensure that candidates showcase their potential, which ultimately leads to the recommendation of the best candidate for the position.

Mzwangwe (2020) argued that many strikes by teachers have taken place under the banner of unions such as the SADTU, due to their advocacy for union members. Zengele (2009:173) stated that controversial appointments because of nepotism contribute to a state of anarchy within schools. Sayeed (2002:30) added that these kinds of appointments are problematic due to the political nature thereof and the fact that it disregards the merit systems and process. Despite this narrative, Sayeed posits that teacher unions maintain their stance in saying that the individuals deployed by them are well prepared for managerial posts through workshops and other training platforms before they are deployed.

The discussion on the disjuncture between policy and practice is to follow; however, it is important to note that teacher unions welcome the proposal of the draft Bill. According to Makaneta, teacher unions believe that it is in the country's best interests to implement the proposed changes as per the draft Bill, as it serves to break the non-progressive practices of SGBs when it comes to matters of the appointment process.

2.3 Teacher unions' influence on quality education and the appointment process

The involvement of teacher unions in the appointment process and other educational activities are often perceived as an act of anarchy in the education system. Nuitjen (2004:118) suggested that anything associated with governance brings elements of anarchy. This perception is advanced by teachers' unions who go beyond their call of duty to advance the interest of their members. According to Zengele (2001:73), the idea of providing a voice to teacher unions often inspires them to overplay their role.

Heystek *et al.* (2001:224) brought forth the stance that unlike the medical profession, which advocates for the client's interests being put first, the narrative in the education sector is different. He suggested that because educational legislation makes provision for teachers to participate in industrial action, it means that the interests of teachers are prioritised above those of the learners (the client). Thus, Heystek *et al.* (2001:224) argued that unions serve the interest of the teachers before anything else. An example hereof is cited in an *Eyewitness News* article, in August 2019, where teachers at a Johannesburg school for autism protested due to poor working conditions at the facility. In September 2015, the *Mail & Guardian* covered the boycott from the SADTU on the Annual National Assessments in schools, which was aimed at advancing literacy and numeracy

skills. This boycott cited ongoing attacks on collective bargaining processes and a lack of proper consultation on other education matters. The last instance refers to the DBE's Ministerial Task Team (MTT) report, of 2016, on the alleged selling of posts by union members and provincial department officials. According to Gina (2016), the chairperson of the MTT, 81 cases were investigated to determine the improper and unfair influences during the appointment of candidates in the education sector.

According to Seabe (2016), teacher unions have been involved in several dealings that can be deemed toxic for the education system. Seabe (2016) argued that this harmful influence on education is inspired by the fact that the unions have captured the education system. Tiwari (2017) believes that a lot of the manipulation and influences that occur in the appointment process of teachers, stem from a culture of string-pulling and a point of resistance which is inspired by loyalty and prejudice. Besides the fact that bureaucratic leadership often appoints people who can carry out an ideology, people generally adopt bias tendencies because they resist the change that occurs during the appointment of people into positions, because of their advocacy for those that share mutual interests (Mbanjwa, 2017). This sort of comradeship can be linked to the social identity theory, which will be discussed later in the chapter.

In a City Press exposé on the 'jobs-for-cash' scandal of 2016, revelations were made about the SADTUs power and influence over the education system. Masondo (2016b) cited a report by the head of Umalusi, Professor John Volmink, as he described the extent of the unions' influence and their powerful alliances that seem to have captured the education system. The researcher links the article with the discussion on affiliative alliances to emphasise the union's power; to determine which candidates would be appointed in advance. Masondo (2016b) referenced the then head of department, Dr Itumeleng Molale, who mentioned that every three years when the SADTU hold elections those who lost their positions would be redeployed to senior positions in the department, irrespective of their qualifications and whether there was a vacancy or not.

Considering the intended location for data collection of this study, which is the North-West province, the researcher finds it important to reference the MTT report and the article by Masondo on the fact that more than 85 per cent of senior staff positions in the department and with schools were deployed by the SADTU after they had served as union office bearers. This information contributes to the study as it epitomises the enormity of influence that teacher unions have when it comes to the appointment process and related educational matters.

According to the DBE (2016), the combination of weak authorities, aggressive unions, compliant principalship and teachers eager to benefit from union membership and advancement has been a major contributor to the education sector's irregularities, which contradict any values of professionalism. The then chairperson of the Portfolio Committee on Basic Education, Ms

Nomalungelo Gina, suggested in the MTT report that to counter any influence in the appointment process, the observer status of unions must be renegotiated and that teachers cease to be office-bearers of political parties, and those in management posts be prohibited from occupying leadership positions in teacher unions. Seabe (2016) stated that the influence of political patronage has won over principle meaning that a lot of educational positions in schools are occupied by incompetent individuals, which enhances the deteriorating state of our public schools.

2.4. The Social identity theory and appointments of promotional positions.

This section is aimed at supplementing the reader's understanding of underlying theories that exist during the appointment of teachers. The study, is to a large extent, based on the ethnographic perspective of qualitative research. In this regard, the research component of this perspective will be discussed in depth in the chapter that focuses on research methodology.

According to Creswell (2007:303), an ethnography focuses on an entire cultural group that comprises various people who interact over time. In this study, we look at the behaviours and interactions between role players such as the teachers, the teachers' unions, the SGB and the DBE. Ethnography is a perspective that enables a researcher to describe and interpret the shared and learned patterns of values, behaviours, and beliefs of a group of people (Creswell, 2007:303). This allows one to analyse the actions of a specific group that seem to have the ability to change or modify individual behaviour by simply altering their own principles. This phenomenon is referred to as the social identity theory.

The discussion of the social identity theory is relevant to this study on the influence of teacher unions in the appointment process, as it conceptualises the underlying narratives behind teacher unionism and cadre deployment. Bush and Heystek (2003:134-136) stated that there is an existence of notable polarities in the educational landscape of South Africa. They argued that this prominent chasm appears to have political, religious, cultural, and racial proclivities which would advance a culture of bias lobbying. The nature of advocacy by teachers' unions for the wellbeing of their members brings about a positive outlook on the relevance of unionism in the public education sector despite the occurrence of several discrepancies that are inspired by bureaucracy.

The working relationship between the DoE and teachers' unions has always been marked by conflict, suspicions, and mistrust (Van der Westhuizen, 2013:119). Zengele (2009:30) suggested that the perceived status of unions as the watchdogs of teacher interests versus the identity of departmental officials as custodians of government policies make it difficult to promote a cooperative culture among the various stakeholders.

2.4.1 Social identity theory of leadership in the appointment process.

Hogg *et al.* (2006:335), refer to the social identity theory of leadership as a hypothesis that conceptualises how group members identify more strongly with other members of their group. Hogg (2001:190) added that this strong connection with the associated group determines a person's perception of effective leadership, to a point where their demographic stereotype-based impressions of their leader match the norm of the group. In this regard, Kelly (2009:450) described leadership as a relationship in which some people are persuaded to embrace new values, attitudes, and goals, and to make an effort in displaying these virtues on behalf of their leaders.

Hogg *et al.* (2006:336) mentioned the concerns over the embroidered prominence of intrinsic properties of leadership, and the little focus there is on the larger social systems within which leadership is embedded. This argument is since one's actions as a leader do not only depend on personal traits but can be attributed to the social groups we affiliate with. Thus, in terms of the appointment process for promotional positions, the researcher believes that the advocacy for an individual is based on their capacity to carry out the mandate of their affiliated groups. The following types of social identity theories are relevant to this study:

2.4.1.1 Social Identity and Self-categorisation

Tajfel and Turner (1972:293) described the social identity theory as the ability of individuals or organisations to modify their perceived identity or self-concepts. They added that the identity of an individual or an organisation is defined by their social group or affiliation which provides a sense of purpose. Turner (1975) stated that social comparisons between groups are aimed at establishing distinctive characteristics and/or properties for one's group, thus linking with the self-categorisation theory. This notion means that a group strives to maintain the subjective perception that society holds about them. This theory helps us understand the principles of reciprocal collaboration and/or support between trade unions and other educational stakeholders, especially in terms of the mutually beneficial aspects.

2.4.1.2 Social Identity and Intergroup relations.

Still linking with the theory of self-categorisation, Hogg (2001:192) argued the process of self-categorisation separates the social world in a noncognitive manner into "ingroups" and "outgroups". Hogg added that these groups are distinguished by stereotypical factors which are determined by prototypical differences between people, based on their perceived positions. This means that the

categorisation of people into these two groups is determined by the generalised perception they maintain in society (in accordance with their assimilated behavioural similarities). More specifically, this logic is based on the multifaced identity that teachers' unions hold in society.

Thus, in interpreting the observation of Hogg *et al.* (2006:336), the researcher believes that the efficacy of a person's leadership abilities is determined by the sense of pride and patronage displayed by other group members, as it is within unions, and how this sense of prestige benefits the self-concept of members. Ultimately, the acknowledgement of being a comrade is a celebrated aspect of affiliation.

2.4.1.3 Social Identity, Self-categorisation, and leadership

In the previous section, the researcher cited Hogg (2001:186), by alluding to how the social identity theory and its related processes influence leadership. According to Hogg (2001:186), leadership can also refer to how cliques (or groups) have disproportionate power and influence to set agendas, define identity, and lobby people to achieve collective goals. Depending on the context, this narrative is substantiated in how teacher unions and SGBs have a distinctive ability to assert themselves through attitudes, rituals or practices, actions, and decisions.

This theory is displayed and cited as MTT reported, by the DBE (2016), which alluded to how the 'jobs-for-cash' culture is endemic. The report also revealed how unions can capture the education system by virtue of affiliations and/or alliances with strong political structures. Masondo (2016a) also mentioned that the report identified patterns of cadre deployment in the education system as chosen individuals were rewarded by being appointed to offices and schools for their benefit and to advantage the union. Masondo also cited the admission of Gauteng Education Member of the Executive Committee (MEC), Panyaza Lesufi, that his office was captured and/or under the control of the SADTU.

This links with Hogg's argument (2006:187) stating, that disproportionate leadership influences through possession of consensual prestige and/or the exertion of power over the orientation, comportment, and the kismet of group members. Ultimately, this solidifies the fact that social identity and leadership is a group process. These processes, according to Hogg (2006:188), operate together in typically defining the increased influential basis of leadership and the emphasis on social identity.

2.4.2 Cadre deployment: Appointing the son of the soil.

In this subsection, the researcher focuses on the role of cadre deployment in the appointment process of teachers. The aim is to shed light on the impact that appointing the “son of the soil” has on the quality of education and how it is manifested through the influence of teacher unions and other educational stakeholders during the appointment process. According to Ambanason (2009:15), the concept of the son of the soil is a theory that describes a specific state of belonging to a group. Asanbe (2014:131) added that the term objectifies the intimate connection between the human and the geographical space into which one is born and/or resides. He stated that essentially the term not only gives reference to one’s place of birth and/or origin but also an individual’s claim of belonging. Thus, the term son of the soil can be ascribed from a perspective of rich socio-cultural and theoretical imports (Asanbe, 2014:132).

From a more political perspective and regarding the appointment process, the term son of the soil is referred to and perceived as a sense of camaraderie or cadre appointment/deployment, which represents the same degree of loyalist towards a certain interest group. According to Kok (2017:1), the concept of cadre employment serves to establish a parallel power structure to a constitution of an organisation, which in this instance is the school. This philosophy serves to ensure that affiliated members answer firstly to the structure/body and secondly to the public while the structure advances its interests ahead of those of the public. Kok (2017:1) added that this appointment strategy is patronage dispensed at individuals, not merit but on the basis that they enjoy some political connection to the dominating structure/body.

In the context of this study, and from a social identity perspective, the discussion on appointing the son of the soil serves to substantiate the high degree of advocacy that an individual would receive from a represented group during their appointment process for a promotional position. Cadre deployment refers to an unwritten policy of patronage-based political appointments to school management positions (Pattillo, 2012). According to Zengele (2013), cadre deployment is a term that is often used by the African National Congress (ANC). This is an endorsed and documented philosophy within the ruling party that allows them to employ loyal party members into management and cabinet positions. Considering the affiliation between the SADTU and the Congress of South African Trade Unions (COSATU) – as an associate of the tripartite alliance with the ANC - this status quo is advanced in the education sector (Kwayiba, 2015:57).

According to Ramontsha (2019:34), the concept of cadre deployment or the son of the soil, promotes a sense of associative bias between schools and the immediate school community - or related stakeholders. This means that unions and other interests groups advocate for the appointment of an affiliated member to ensure that a mandate is advanced and maintained. According to Taylor (cited by Kwayiba., 2015:57), the concept of cadre deployment undermines merit systems, which serve to ensure that individuals who are appointed possess the necessary competence to hold that position. He mentioned how competence is not the only measure of

determining an individual's suitability for appointment in a position but also their political connections.

Zengele (2014:473) contended that this practice often side-lines an abundance of teachers who have management aspirations from the selection and appointment process for management positions in favour of highly unionised teachers. He added that these teachers who are overlooked refer to individuals who have honours, master's, and doctoral qualifications. According to Diko and Letseka (2009), the recruitment and appointment of quality teachers through cadre deployment are driven by competitions for financial incentives that reward the degree of union activism by school leaders.

Pattillo (2012) mentioned how the SADTU is often criticised for the way ineffective teachers are protected by the union. Kwayiba (2015:60) added that the union vouches for teacher tardiness, absenteeism, and the ineffective management of schools. He also mentioned how it is unsettling to see reports of increasing cases of corruption by dominant teacher unions, like SADTU, which is involved in unfairly and amorally promoting their hand-picked candidates in exchange for payment.

According to the Director-General for Basic Education, Hubert Mwel (cited by Ndenze., 2016), cadre deployment and the appointment of unions officials weaken the department and the country's education system. He added that those individuals often struggle to demonstrate their ability to balance the complexity of competing loyalty and demands. Ndenze mentioned how the concept of cadre deployment was acknowledged by the Director- General as a global practice but alluded to the fact the implementation thereof is problematic. She stated that it becomes a problem when individuals who aren't qualified, and who don't have the requisite experience are employed; hence, the reason for the investigation of the selling of posts in the provincial departments.

Ultimately, Kwayiba (2015:132) argued that the reason for poor service delivery and the eventual brain drainage of excellent quality teachers into other professions and/or countries is because of cadre deployment. Cadre deployment is the kind of practice that perpetuates tendencies of employer bullying, except that the employer is the union (Diko & Letseka, 2009). They added that this eventually impacts the quality of education provision. According to Diko and Letseka (2009), cadre deployment creates a perception for aspiring teaching managers - those who want to apply for management positions - that experience and qualifications are not of importance in their application for promotion. They added that cadre deployment advances the notion that such qualities are outweighed by union activism and loyalty. Zengele (2013:230) affirmed that this narrative leads to teachers neglecting their core responsibilities in the school, which compromise the quality of education that learners receive.

According to Van Wyk (2007:136) this kind of partisanship is also displayed in the fact that SGB members would often misuse their authority and financial prowess to disregard the competence of

a candidate, during the appointment process, with the aim of advocating and choosing an individual who represents them better in the name of “son of the soil”. Ramontsha (2019:34) alluded to the fact this kind of practice is exercised with the aim of preserving influence and power by having a “local” person who will understand the school better and preserve the cultures thereof.

According to Koridia and Soni (2014:8), in most communities, the position that one holds in one’s profession asserts one’s social status and benefits those with whom they resonate and/or associate. This means that due to the scarcity of promotional positions at schools according to the context thereof, the advertisement of promotional vacancies brings about a competitive culture and rivalry. Thus, according to Ramontsha, (2019:35), some teachers would influence the SGB to recommend them for promotion based on their external associations with each other.

The draft Bill, as proposed by the minister of basic education, Angie Motshekga, serves to counter the son of the soil philosophy. According to Masuku (2020), this draft Bill means that SGBs are stripped of their authority to make recommendations on promotional appointments. He added that the DBE intends to address matters of corruption that occur during the appointment process. According to the MTT report, put forth by the DBE (2016), a lack of consistency and understanding by the SGB regarding the appointment system and procedures have been strong reasons for the reform of laws and regulations by the DBE. According to Mahlangu (2019:114), SGBs have in recent times been politicised. He mentioned the fact that the political affiliations of some parents/SGB members have a way of infiltrating school systems which compromise the management thereof.

The draft Bill refers to cases where SGB’s challenged the decision of the HOD to appoint a candidate who was not their preferred choice, as in the case of *Head of the Western Cape Education Department and others v. Governing Body of the Point High School and Others* 2008 (5) SA 18 (SCA). In this instance, the HOD appointed a candidate who was second on the SGBs recommendation list for purposes that would advance employment equity. The candidate who the SGB were advocating for not only scored higher points during the interview process but was also a prominent figure in the community, and he resonated with the ideals of the SGB.

Ultimately, according to Baker (2018:28), in a general sense, members of an SGB are parents who are active school and community members who know the school’s best needs and interests. She added that these individuals have a higher likelihood of advocating and supporting individuals who are prominent figures and representatives of the community or group that has the most representation in the school.

According to Zengele (2013:232), cadre deployment and/or appointing the son of the soil is detrimental and diminishing to the reputation and the credibility of the profession. He argued that

this practice adversely affects the quality of education as it has a moral impact on the teachers; it disrupts the dynamic of management in schools; and it promotes a strong culture of bureaucracy.

2.5. The disjuncture between policy and practice

Whenever there are discrepancies regarding the functionalities of a certain profession, the first point of reference is the policies and how they are implemented. According to Tiwari (2017), policies serve as a norm of conduct for members of an organisation, meaning that it provides guidelines and order, which determine behaviour and ensure sustainability in how an organisation/profession is governed. In laymen terms, this would mean that policies serve to regulate our behaviour and subsequently set the ethical standard within a profession. Steyn *et al.* (2015:1139) mentioned that the education system embraces a structure for policy and teaching. This means that the education system makes provision for the effectiveness of teaching and learning opportunities through the implementation of set policies in educational practices. Steyn *et al.* (2015:1139) also mentioned that the education system embodies different elements such as education levels and the linkages across each other through the determination of policies, especially regarding the appointment process. Perhaps this would refer to having certain minimum requirements that need to be set to determine the eligibility of an individual for a certain post. It could also serve to motivate teachers to continue developing themselves within the profession with the ambition of occupying promotional positions. Ultimately, this would mean that policies provide us with information that we should take cognisance of; in the development of teachers and to promote merit-based appointments that reflect the efficient implementation of education policies.

An example of a policy framework is the SASA 84 of 1996. As we know it, the recruitment process of teachers in accordance with Article 32 to 33 of the SASA states the following with regards to teacher personnel:

(32) The minister of education determines national policy in respect of teacher post provisioning, in terms of the National Education Policy Act 27 of 1996. According to Section 5(1) of the Employment of Educators Act 76 of 1998, the educator post establishment in each province is determined by the MEC, subject to national norms prescribed for the provision of posts.

(33) The minister determines norms in respect of posts to be allocated to public schools, in relation to their curriculum and other circumstances, which the HOD must follow in distributing the available posts within the approved education establishment of a Provincial Education Departments (PED).

The implication of Articles 32-33 of the SASA, asserts the fact that the provision of departmental positions at schools is determined by the MEC for education in a province. According to Makhoba *et al.* (2018:15), the provision of posts is based on the principle of fairness and transparency. The Kwazulu-Natal Department of Education and Culture (2003) also declared that the provision of posts serves to facilitate the movement and placement of teachers in an equitable manner. According to Lynch and Baker (2005), there is an underlying need to address inequalities and compromised processes of post-provisioning at schools.

According to Nthuli (2012:5), the PPM serves as a Resource Allocation Model (RAM) which aims to optimise education human resources to various public schools. Nthuli further highlighted the fact that post-provisioning should maintain standards of equity, transparency, and resource-efficiency. Despite the clear norms and standards that are identified in the PPM, the education system still faces many challenges regarding appointing teachers in accordance with the Post-Provisioning Norm. Naicker defined the PPN as the total number of posts allocated to a school in a particular year. Furthermore, according to Naicker (2005), the process of post-provisioning seems to be failing as it only benefits certain interest groups.

The LRA is one piece of legislation that aims to advance fairness and equality in the workplace. According to Mampane (2009:72), the LRA also serves to advance democracy within workplaces. In doing so, it advocates for the protection of workers' rights and establishes a prestigious culture. Chisholm (2012:119) confirmed that South Africa focuses a lot on the redistribution of resources. The essence of this distribution of resources stems from the perspective of redressing the imbalances of the past, and to provide quality education for all citizens. According to Modisaotsile (2012:1), the government needs to ensure that schools are equipped with the necessary resources (including qualified teachers) to ensure optimal functionality.

According to Zengele (2013:18), the increasing level of nepotism and intimidation in the filling of promotional posts have become so prevalent that it affects the motivation, academic and professional quality of teachers at schools. Zengele (2013:18) also added that the undue involvement of unions in the provision of promotional posts at schools has contributed to a culture of distrust and incompetence in the education sector. By virtue of this statement, the argument is that the system as we know it, is compromised due to underlying motives.

Furthermore, Cowen and Strunk (2014) stated that teacher unions are identified as innate and acute figures in the democratic disposition and the provision of education. According to Alvarez, Moreno and Patrinos (2007), the strength of a union can be measured by the level of their influence over appointments and their affiliations with state governments. Although this assumption would need a research study of its own, it still probes the question as to which union most teachers in promotional positions (at public schools) are affiliated with. Makhoba *et al.* (2018:39) alluded to

the communication via a circular that was drafted by teacher unions in 2017 who were opposing and restricting the redeployment of teachers. All this was considering allegations of mismanagement of the PPM processes and related policies.

Furthermore, according to Zengele (2013:19), there is an increasing sense of entitlement by union members for promotional positions when they are created. He argued that as soon as these positions are established, and advertised, unions completely disregard the democratic principles of the post-provisioning system (PPS). In accordance with Section 195(1)(a-i) of the constitution of South Africa (1996), as well as Section 20(8) of the SASA 84 of 1996, the recruitment process must advance the following principles:

- non-discrimination and equal representation
- redress of past imbalances
- consistent fairness and equality throughout the entire process
- competency and merit by the candidate

Furthermore, in accordance with the Employment of Educators Act 79 of 1998, and Resolution 6 of 1998 (which refers to the Education Labour Relations Council) which serves to instruct on the methodology for the justification and redeployment of teachers in the provision of posts, the process of appointing and/or redeploying teachers into promotional or new positions should be based on the operational needs of the school and professional qualification. The matter of appointments that are based on qualifications, comes up as a major argument throughout this study. According to Morrow and Kevvy (2006:38), formal academic and professional qualifications are a necessity for teachers, as it determines the quality of their teaching. According to Zengele (2013:20), a 2009 survey found that most teachers in promotional positions only had a diploma in education while others who did not occupy those positions were qualified teachers with honours, masters, and doctoral degrees. As a footnote, this may be an indication that the aspect of qualifications is overlooked, while political affiliation takes precedence, despite the values that are entrenched in policies. In accordance with the ELRC Resolution 6 of 1998, the document set out the following:

- entrenched principles of redress and equity in educator provisioning; and
- protect educators from victimization.

According to Geyer (1992:2), this solution was to ensure the comprehensive participation of teachers' unions in the process.

The latter refers to a process that serves as a framework/norm by which post-provisioning and appointments should adhere to, and the importance of involving teachers' unions to maintain transparency. This statement is enforced by Section 3.2.1(d) of the Collective Agreement (no.2 of 2005) in the LRA which proclaims that there should at least be one union representative in the appointment process of promotional positions. This union representative would serve in an observer capacity during this process.

Furthermore, an amendment of policy that was aimed at bridging the gaps in the SASA, declaring the authority of SGB's, as per paragraph 1.2. of the Government Gazette No. 41179 (2017:33) for the proposition to amend the SASA No. 84 of 1996 and the EEA 76 of 1998. This proposal is based on the argument that SGBs are given too much power in the appointment process. As it stands, in accordance with Section 8(2) of the EEA, the filling of promotional posts and the redeployment of teachers may be conducted with the approval of the SGB, with the superscription of the Director-General of the DoE. In addition, according to Section 6 of the EEA, there has been an insertion of Subsection 3 (a)(ii), which states that the appointment, promotion, or transfer of any promotional post on post level 2 to 4 on the educator establishment of a public school shall be determined from candidates identified by the HOD, in the manner prescribed by regulations by the minister.

This now eliminates the role that SGB members would have played in the appointment of promotional vacancies at schools. With the stakeholders in this process being fewer, one needs to re-evaluate the role of teacher unions in the appointment process considering their role of advocating and serving as observers on the appointment panel. According to Ramontsha (2019:6), this amendment truncates the responsibilities delegated to the SGB concerning the recommendation of teachers for appointments. This is a measure by the state, to address the prominent discrepancies that occur when SGBs carry out their responsibilities during the appointment processes.

The prominent policy wars and power struggles between teacher unions and SGBs bring about various questions regarding the types of alliances that seem to blur the objectives of set policies. In 2016 the minister of basic education lodged an investigation that aimed to probe the allegations that were made regarding the selling of posts in 2014. Harper and Masondo (2014) reported the following:

- How a teacher - after identifying the position they wanted, due to the resignation and/or retiring of a colleague - approached a local union official who was involved in the selling of positions for cash, to the amount of R30 000.
- The union official then meets up with a member of the SGB to contrive the appointment process.

- Should the vacancy be filled already, the SGB is used as an instrument to disconcert the individual in the reigning position, even if it means forcing them out.
- The SGB then recommends the teacher who has paid the selection panel. This panel consists of the beneficiaries (i.e., department officials) of the payment.
- This official subsequently recommends the person that was suggested by the SGB to the HOD, for appointment. In the end, the teacher gets the job.

In the report of the investigation conducted by Minister Angie Motshega, according to Volmink *et al.* (2016:44), the elements that threaten the successful implementation of the appointment policies were the dependence of the process on SGBs; the existence of SGBs at public schools, the skill sets of SGBs and additional capacities, and the minimum requirements (or the absence thereof) for promotional positions.

Furthermore, in accordance with the Employment of Educators' Act 74 of 1998, and regarding the redeployment and transferring of teachers, teachers' unions are regarded as mere observers and not participants in the appointment process of teachers. It has been established in various research studies and policies that union representatives assume the role of an observer in the appointment process; however, considering the discrepancies that occur, these representatives go beyond their call of duty. According to Zengele (2013:21), besides the advocacy that takes place prior to the interview, the union representatives start influencing the process during the interview. He stated that it often happens that the interview panel relies on the knowledge of the union representatives during the interview, which allows them more reign, as they tend to have the answers to most problems and/or questions. Perhaps this cites the incomprehension of SGB members. Considering the literacy levels within our communities, this raises questions on whether SGB members have the competency to be involved in these kinds of processes.

2.5.1 The power of affiliative alliances.

In the section that focused on cadre deployment and the appointment of the son of the soil, the researcher alluded to the influence of political connections and/or affiliations on the appointment process of teachers. The researcher cited Pattillo (2012) in affirming that cadre deployment refers to a form of undocumented policy of patronage-based political appointments to school management positions. This links with the following section, which aims to investigate the role of affiliative alliances and the influence thereof on the appointment process.

The first point of reference in the discussion about the power affiliative alliance lies in understanding the fact that the management of any formal system is driven and/or endorsed by a specific mandate. According to Twala (2014), policies such as the cadre deployment policy, as

implemented by the ANC and its alliance parties, serve to ensure that its declared intention to have loyal party hands on all the structures of power in government is maintained. Jeffrey (2012) affirmed that the intention of the tripartite alliance is to give the ANC supremacy over all levels of state power and governance.

According to Professor Volmink (cited by Masondo, 2016b), “teachers’ union SADTU’s membership of the tripartite alliance gives it enormous power and influence over the education system”. Masondo (2016) referenced Volmink in stating how the situation and the corruptness of this partnership are inappropriate and dangerous as it seems to hold the education system hostage through its political processes. In the MTT report, by the DBE (2016), there was the indicative presence of huge power and influence by a union that repeatedly and interminably sought to entrench itself in offices, schools, and other related key positions.

According to the MTT report, by the DBE (2016), Volmink mentioned how the commitment to a single political party by unions is dangerous and inappropriate. The professor argued that “educators who join the union are committed or bound to that party, which makes the fortunes of the education system depend on the fortunes of a political party.” This also means that these individuals mutually benefit and or get rewarded for their affiliation to the union and the related alliances.

According to Kwayiba (2015:15), considering the involvement of teacher unions in the management aspects of schools makes it easier to understand that the involvement of unions is an expression of their political will to advance and promote the interests of the organisation. He added that these interests ascertain a narrative of micropolitics and political dominance within the formal sector. Stimmel (2010:09) describes micropolitics as the use of power by individuals and/or groups to advance their goals in organisations. He mentioned that although micropolitics are regarded as differences personal differences, it is often motivated by using power and influence. Thus, Kwaiba (2015:15) argued that this kind of political alliance is based on a transformative social and educational agenda which is strategically positioned to influence educational procedures.

Jansen (2004:323) argued that the South African education system is negatively influenced by politicians and bureaucrats who are often misinformed about the conditions of our schools and would rather enforce policies. He mentioned how learners are caught in the middle of this war between negative politics and diplomatic attempts to improve the education system.

According to Disterer (2001:3), more bureaucracy is often a sign of formal and rigid procedures. This organisational structure often lacks the required efficiency to address specific needs. This is where schools should be given the authority to advocate for a particular candidate. Disterer argued that bureaucracy prevents cross-functional communication and co-operation which ultimately

hinders knowledge sharing. Jansen (2004:323) stated that bureaucracy often leads to corruption because of the lack of logically justified decision-making and management.

To understand the dynamics of power and/or authority when it comes to aspects of school governance through the appointment of teachers, and the provision of quality education, we need to understand how and where the different role players get their power and/or authority from. According to Bayrak *et al.* (2014:81-23), the following types of power are manifested in the governance of schools and has an influence on the quality of education that is provided:

2.5.1.1 Legitimate Power

Bayrak *et al.* (2014:81-23) state that this kind of power is defined as status power. They mention that legitimate power is often perceived as authority and empowerment. This refers to a leader's ability to influence employees or subordinates through their formal position.

Kwayiba (2015: 102), stated that teacher unions never hesitate to challenge the employer or the government when its members' rights are blatantly disregarded. He added that the union would even embark on labour action to ascertain the legitimacy of their authority in the labour sector.

In another instance, according to Zengele (2009:48) legitimate authority is often displayed through the relationship between a school principal and the SGB. He alluded to how often it occurs that a school principal uses his qualification and position to influence the decision of SGB's in matters related to school governance.

2.5.1.2 Coercive Power

Hoy and Miskel (2005) posit that coercive power is based on fear. They stated that this kind of authority is based on a reward and punishment system, with the aim of influencing the behaviours of others from a dictated perspective. Bayrak *et al.* (2014:81-23) add that coercive power refers to materialistic and spiritual punishments given by those in power to their subordinates.

Mahlangu (2019:115) mentioned that the militant culture of teacher union members is inspired by the fact that they have higher qualifications, yet they are unfairly treated and forced to occupy lower ranks. He contended that the top-down management style that principals use is ineffective as it relies on coercion to determine certain outcomes. Dwangu (2018:108) argued that such

instances inspire union activists to use their political affiliations to influence the outcome of their ventures within the school and ultimately create adversaries between principals and teachers.

According to Ramontsha (2019:39), this kind of power is also exercised by SGBs that strongly advocate for a candidate with the aim of getting something out of the deal. He added to how this kind of system was employed to achieve certain outcomes in crucial decision-making processes.

2.5.1.3 Reward Power

Bayrak *et al.* (2014:81-23) described this kind of power as one that allows a leader to reward and individual in return for displaying desired behaviours. They added that this kind of power occurs a lot due to the attractiveness of the rewards. Depending on the outcome of a particular process, the relation between reward power and coercive power becomes evident (Bayrak *et al.* 2014:81-23).

Zengele (2014:48), also alluded to the selling of promotional posts in KwaZulu-Natal where the advocacy and eventual appointment of an individual would serve the greater course of benefiting the organisation, by ensuring that power remains within the political structure. Zengele (2013) referred to the fact that teachers would get themselves fully involved in union activities at the expense of spending more quality time in class, to be rewarded with promotions.

2.5.1.4 Expert Power

Expert power is the type of power that is based on an individual's knowledge and skills (Bayrak *et al.* 2014:81-83). They added that expert power depends on the individual's personal traits. This means that a person's authority is often vindicated by virtue of their academic acumen, hence the general advocacy to appoint people into promotional positions based on their qualifications as well as experience.

According to Zengele (2013:47), expert power allows teacher unions to act beyond their observer status during the appointment process of teachers, as it could indicate that they are more knowledgeable on aspects of legislation. In accordance with Clause 10 of the draft Bill, it is also suggested that SGBs in most public schools do not have the necessary skills to conduct the interview process due to their lack of knowledge of aspects of teaching and learning. Ultimately, the union members that should serve as mere observers end up providing inputs during the interview process.

On the other hand, Jansen (2004) argued that politicians must stop interfering in education affairs and leave it to the experts. However, Chislom (2004) contended that history and the development of teacher unions are strongly linked to their political relationship with the government. This means that the political network of teacher unions allows them to hold the upper hand when it comes to political activities that involve management duties at schools.

2.5.2 The challenges: Organizational control and the conflicts over policies

Gasa (2016) alluded to the important role that the Education Labour Relations Council (ELRC) plays in the enforcement of provisioning policies, and the influences they exercise in advocating a mandate, which contributes to a biased culture. Often, disputes arise in the appointment of an individual especially if the person does not represent the various polarised fractions that exist in that school. In an article by Chuenyane (2009), which was published by *City Press*, on 8 June 2009, SADTU members had gone on a two-week strike to oppose a decision by the Gauteng Department of Education (GDE) District Director who refused to support the appointment of candidate principals that the union was advocating for, despite that recommendation being the jurisdiction of the SGB. In this incident, which was covered by *City Press*, according to the SGB of that school, the union was endorsing candidates that lacked both the required experience and qualifications. It was also discovered that the candidates were not only affiliated with the union but also had personal relationships with members of management in that union, subsequently citing nepotism in this regard.

According to Pattillo (2012:60), the influence of unions is so severe that it has provided the removal and/or exclusion of the SGB in the appointment process. Pattillo argues that there were occurrences where unions would manipulate and intimidate School Governing Bodies that had power over the selection of a candidate. Incidents of bribery also became prevalent, considering the scandals in KZN.

Section 20(1) of the SASA states that the SGB can make recommendations to the HOD regarding the appointment of teachers. Based on this declaration, in accordance with Section 16(1) of the SASA, it is also stated that the SGB has the power to exercise its delegated power subject to the terms of decentralisation of power to school communities. This would mean that SGBs should be developed in such a way that they can add more value to the development of the school, thus, creating a conducive teaching and learning culture. According to Disterer (2001:5), a good way to foster the transfer of knowledge is through community development. He argued that more networking platforms should be created, and workshops should be held that promote parent involvement. When it comes to the public-school sector, parents should be encouraged to invest more in the education of their children despite their socio-economic circumstances.

According to Glen (2000:178), the extent of the SGB's authority in the appointment of teachers, serves as a good indicator for self-governance within schools. We often take for granted what influence a collaborative effort by parents within a community can have on the organisational culture of public schools. According to Hogan and Coote (2014:1609), organisational culture is an anthropological phenomenon that reflects the behaviour and the management of an organisation - in this instance, the school. In maintaining the context of this study, the issue of SGBs acting beyond their delegated duties becomes a critical matter. According to Beckmann and Prinsloo (2009:173), the state has in recent times cautioned SGBs against their overinvolvement. Beckmann and Prinsloo (2009:174) also touched on how steps have been taken in limiting the involvement and powers of stakeholders, such as the SGB in the appointment of staff. In accordance with Section 6(3)(b) of the Employment of Educators Act, 76 of 1998, SGBs are encouraged to comply with the principle of fairness, equity, redress, and representation.

Mncube and Mafora (2013:16) alluded to the fact that, in recent times, the actions of SGBs have not been a positive reflection of the principles envisaged in Section 195(1)(i) of *the Constitution of the Republic of South Africa*, 1996. Ramontsha (2019:6) added by stating that the involvement of SGBs in the appointment process has probed incidents where teachers are promised promotions based on their association with members of the SGB, a compromised selection of panel members, who are endorsed by forces within the community to manipulate the system and list of recommended prospective candidates and the disputes that arise when a candidate is appointed. According to Van Wyk (2004), SGBs will appoint candidates who they predisposed deem appropriate to teach learners at their school.

2.3. Conclusion

In this chapter, the researcher addressed the following aspects. Firstly, the critical importance of providing quality education in the new dispensation based on aspects of school governance, and the appointment process for promotional positions. Secondly, the researcher examined the logic of providing a voice to teacher unions within a set of policies and pieces of legislation in terms of exercising and maintaining organisational control and conflicts over policy. Thirdly, the focus was on the micropolitics of teacher unions and related stakeholders in advancing the interest of their members first, then that of the state through the ideology of social identity. Finally, the researcher discussed the interesting behaviour of teacher unions when they are pursuing organisational and personal interests ultimately distorting the balance between policy and practice.

This literature framework was aimed at giving the reader a deeper understanding of all the educational factors that contribute to the study. Most professions in South Africa are maintained through a patriarchal system, which nowadays fails to ask those subversive questions that enhance the critical thinking of policymakers. One should acknowledge that the bureaucratic values by which the public sector is managed is often the main reason for corruption within the education system; thus, hindering the academic prosperity of South Africa.

Chapter 3: Research design and Methodology

3.1. Introduction

The literature review in Chapter Two highlighted the various factors that influence the appointment process for promotional positions at public schools. The researcher reviewed the various factors that contextualise the phenomenon of a distorted appointment process. Chapter Three will focus on aspects of research methodology and the methods that were employed to address the research questions.

The primary research question seeks to determine the following: whether there are distinct centres of power within the management and governing forces in the appointment of teachers. Secondly,

the researcher seeks to determine the link between micropolitics and school governance with regard to activism and leadership. Thereafter, the researcher probes whether a merit system advances social justice and equity. Lastly, we investigate how teachers perceive the role of unions and authority in the appointment of promotional vacancies

This chapter will adopt the following structure: the discussion on the qualitative research design (3.2) that will be employed. This will be followed by the research methodology (3.3) and the subsequent paradigm (3.4). A brief discussion on the selection of participants will be provided (3.5), followed by a discussion on the data collection (3.6) and the related techniques. Thereafter, the focus will be on the analysis of the data (3.7) that was collected. Towards the end of the chapter, aspects of validity and trustworthiness (3.8) and the ethical considerations (3.9) of the study will be discussed, and lastly, a summary to conclude the chapter (3.10).

3.2. Research design

3.2.1 Qualitative research

Nieuwenhuis (2016:53) defines qualitative research as exploratory, as it aims to decipher the underlying meanings/reasons and/or of a particular phenomenon. He explains that qualitative research provides a deeper understanding and/or perspective on a particular problem and develops ideas for potential quantitative investigations. Madrigal and McClain (2012) added that qualitative research describes the characteristics of a finding meaning that qualitative research interprets the pattern in the behaviour, emotions, or any other naturalistic observation of something.

According to Nieuwenhuis (2007:70) and Punch (2009:112), qualitative research is based on the combination of philosophical assumptions, specified participants, and methods of data collection and analysis. Nieuwenhuis (2016:45) argued that qualitative research justifies how a phenomenon becomes clearer and makes more sense as one spends more time analysing the development thereof. Madrigal and McClain (2012) also mentioned that when qualitative research is conducted, the researcher focuses on the trends in the data. This means that one identifies the patterns across a broad spectrum of variables or participants.

According to Nieuwenhuis (2016:53), the primary advantage of using qualitative data is the fact that it is often based on human experiences. This is often conducted by observing the behaviour of people and interpreting their emotions. Madrigal and McClain (2012) stated that such research frameworks are fluid and based on the availability of incoming data. This means that one can always take varied approaches when gathering data should it happen that the results be inconclusive. Further advantages, according to Madrigal and McClain, is the fact that the collected

data often have a predictive element to it. This creates a lot of room for assumptions and personal perspectives. The similarity comes in when the respondents find themselves in similar circumstances.

More advantages include the fact that any complexities that occur in the data, can be used to formulate certain conclusions. Nieuwenhuis (2016:55) regarded this as interpretivism as it adds a unique perspective to the data, considering that one cannot remove the human experience from the equation based on the varied perspectives or events. He added that these complexities often generate an in-depth conclusion that accurately benefits society. Figure 3.1 below graphically illustrates how the research design was conceptualised in this study:

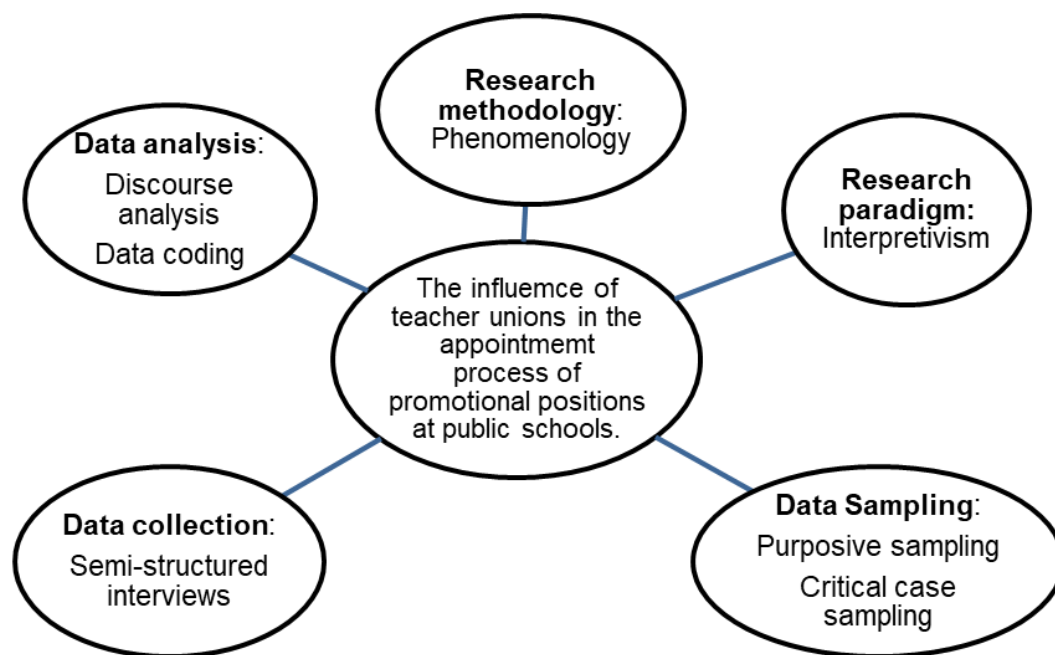


Figure 3. 1 Research design

Source: Own compilation (2021)

3.3. Qualitative research methodology

3.3.1 Phenomenology

According to Pringle *et al.* (2011:8) and Smith (2013), the term phenomenology originated from the Greek word that means “bringing to light”. They added that this research method focuses on the study of people’s life experiences and understanding the meanings that attribute to those experiences. Fouché and Delport (2013:65) alluded to phenomenology as seeking to evoke the meaning attached to daily life in conjunction with a participants belief system that encompasses the phenomenon. In laymen’s terms, the research approach focuses on describing and understanding rather than predicting the behaviour of people.

Nieuwenhuis (2016:7) mentioned that qualitative research is based on the collection of rich descriptive data, which is based on a phenomenon that aimed to broaden one's understanding of something. Phenomenology is relevant to this study as the researcher aims to investigate and interpret the experiences of the participants to understand the meaning of a particular occurrence (McMillan & Schumacher, 2014:372). In terms of this study, the researcher focused on the underlying factors and/or agendas such as micropolitics, power (governance) and quality (competence and/or merit) to gain a better understanding of those inimical factors that affect the quality of the overall public education sector and the performance of teachers and/or schools. According to Smith (2013), phenomenological methodology and the interpretivist paradigm are closely linked. He added that the reason can be found in the fact that epistemologically speaking, phenomenological approaches are found in a paradigm of subjectivity and personal knowledge which highlights the importance of personal interpretations and perspectives.

3.4. Research paradigm: Interpretivism

According to Nieuwenhuis (2016:60-61), interpretivism refers to a social construct that is based on the critique of positivism in social science. This means that interpretivism is based on grouping certain ideals and diverse approaches or outlooks to create groupings, which have similarities. In addition, one can say that interpretivism refers to a sense of consciousness for independence and the advocacy of subjective interpretations. Nieuwenhuis (2016:60) also mentioned how literature in sociology explains how individuals experience and understand the same objective reality on their varied cognitive capacities. They argue that interpretivist criticise positivism, as the order of life is sustained through social constructs that contextualise human actions.

Nieuwenhuis (2016:61) also alluded to how the interpretivism perspective is based on the assumptions that human life is understood from within. This means that the human experience is subjective. Referring to how a person constructs and interacts in his social world. Another assumption is that the human mind is the purposive source of meaning. This paradigm links with the study on the influence of teacher unions during the appointment process. The occurrences suggesting that there is an influence on the appointment process is an assumption that is based on human curiosity. As such, we gain a better comprehension of things as we explore life.

Regarding this study, interpretivism as a paradigm of qualitative research creates industry-specific insights. This means that when one focuses on a specific demographic, the researcher gets a better context and can accurately interpret propositions. One can also add that certain explanations become a lot clearer and can justify the behaviour that comes with them. According to

Cohen and Crabtree (2006), the interpretivist paradigm relies on naturalist methods of inquiry, such as interviewing and the analysis of existing literature.

Nieuwenhuis (2016:56) further stated that all research is based on underlying assumptions about what is regarded as valid and the type of research methods that are suitable in a particular text and for a specific reason. Thus, in determining the validity of this study, the following characteristics of the interpretivist paradigm are applicable.

3.4.1 Ontology

According to Nieuwenhuis (2016:56), individuals' knowledge, values and experiences are acknowledged for being unique, meaningful, and worthy of exploration. As such, by investigating the factors that determine the effectiveness of the appointment process, Schnelker (2006:45) substantiated the narrative that reality is a mental construct that cannot exist independently from the participants' experience of reality.

3.4.2 Epistemology

In terms of epistemology, Cohen and Crabtree (2006), argued that knowledge is constructed subjectively as it is constructed by the lived experiences of teachers. Considering that data were obtained from the perspective of teachers and related stakeholders, the construction of knowledge is intersubjective (Taylor & Medina, 2013). Nieuwenhuis (2016:60) posited that in developing an empathetic understanding of the perceptions that determine the sense-making of participants, the researcher will have to use his own subjective experiences.

3.5. Population and sample: Selection of participants

According to Nieuwenhuis (2016:84), sampling refers to the process during which a researcher selects their focus group to serve as participants in the study. This means that sampling can be regarded as a research inquiry method that focuses on selected items or parts of a population that share common interests. With this study, the researcher will be looking at data-rich people. These are people who contribute to the findings of this study. Nieuwenhuis (2016:84) stated that the purpose of sampling is to allow for equal chance and to eliminate the prospect of any bias that might compromise the findings of the study. The following types of sampling are applicable in this study.

3.5.1 Critical case sampling

According to Patton (2002:243) critical case sampling refers to cases that are chosen to dramatically demonstrate a phenomenon. Furthermore, he added that this type of sampling draws attention to features and subsequently contributes to the research problem, with the intention to decipher the latter. Thus, for this study, the researcher investigated the 'jobs-for-cash' scandals and related influences in the appointment process that compromise the credibility and prosperity of the education system. Considering the national call to curb matters of corruption and to improve the quality of education at public schools, and the general education system, critical case sampling serves as the starting point to gain a better understanding of this study.

3.5.2 Purposive sampling

According to Patton (2002:242), purposive sampling refers to a hybrid approach which is aimed at selecting participants that display variations on a particular phenomenon but each of which is relatively homogeneous, to enable the comparison of subgroups. In the context of this study, Patton (2002:242) added that the source of information used by the qualitative researcher includes individuals, documents like legislation, reports, and sites regardless of the use of purposive sampling to select data-rich cases for analysis.

Thus, to understand the participants in determining the influence of teacher unions on the appointment process, the researcher purposefully selected the participants for this study.

A selection of three Quintile 1 schools in the North-West Province was made where individual interviews were conducted with staff members of the following interest groups:

- Three school principals.
- One deputy principal.
- Two departmental heads – these are teachers who serve on the SMT as DHs for different subject areas.
- Two union representatives – these are teachers who serve as site-stewards for their respective unions.
- One SGB member who represents the teacher component of the governing structure.
- One SGB member – who serves as the SGB members of their school and represents the parent component of the structure; and
- One departmental official, who serves in the human resources (HR) department of the district.

Considering the restrictions were brought about by Covid-19, the researcher found it difficult to reach the intended target of participants, and to conduct face to face interviews.

3.6. Data collection: Interviews

According to Peters (2017), data collection is a process during which the researcher uses information gathered from relevant sources to determine the answers to questions and subsequently evaluate the outcomes thereof. There are various methods for data collection; however, the method depends on the research problem, the research design and ultimately the availability of information for that study.

According to Nieuwenhuis (2016:92-93), an interview is a two-way conversation during which an interviewer directs questions at a respondent to obtain certain information from said person. For this study, the interviews were semi-structured to leave room for open-ended questions. Although the chances of getting side-tracked are significant, one needs to allow the respondent to express themselves freely to allow for the collection of sufficient information, and the subsequent interpretation of the findings of that interview.

3.6.1 Semi-structured interviews: Individual interviews

According to Cutcliffe (2000:1478), interviews refer to a process of predetermined structured or semi-structured questioning. This form of interview ensures that the researcher gathers information on the matter at hand. The use of semi-structured interviews allowed the researcher to probe underlying matters that could contribute to the study. According to Nieuwenhuis detail-oriented probes are aimed at understanding the “who”, “what”, and “where” answers of the respondent. This also means that one can interpret the emotions that accompany the responses of the participants. Nieuwenhuis (2016:94) stated that the advantage of conducting interviews is that they are reproducible. This means that someone else can use the same topic to gather other information. He also stated that an interview occurs systematically, which serves to ensure progressiveness in terms of data collection.

There are also quite a few disadvantages that come with conducting interviews. According to Nieuwenhuis, interviews are often time-consuming. This can either be when the interview is being scheduled and/or set up or the session itself. Normally, people are not too keen to sit and listen to the person who is interviewing them. He also added that the analyses of interviews can be costly. When one considers the travel costs, the equipment and sometimes the remuneration for the respondents. The biggest disadvantage and/or challenge is the fact that interviews can always be interpreted differently, leaving the possibilities for inconclusive data.

The interviews were conducted voluntarily at a location determined by the participant. Considering the dangers and limitations of Covid-19, safety protocols were always prioritised. When a participant agreed to a face-to-face interview, the researcher ensured that all parties wore masks; maintained a safe social distance of 1.5 meters, sanitised and adhered to other related health protocols. When participants preferred to conduct the interviews virtually, due to health and safety reasons against the backdrop of Covid-19, the researcher ensured that interviews met the ethical requirements as set out by the NWU- Research Ethics Committee.

All the ethical requirements were explained to the participants before the interview and before the commencement thereof. The interview was recorded digitally in a meticulous manner to ensure optimal results. Before the recording started, the researcher obtained permission from the participant, and in doing so informed them/gave a disclaimer that the recording and/or data will not be used for any other purposes except for this study. While the interview was being recorded, the researcher took notes to ensure that every detail is captured. Vockell and Asher (1995:199) suggested that the tone of the interview be inviting and does not threaten or intimidate the participants. This principle was followed to assure the participant of the confidentiality and trustworthiness of the interview.

3.7. Data analysis and interpretation

3.7.1 Transcription

All the data that was collected during the interviews, was recorded on phones and a voice recording device. The “flight mode” setting was activated on the phones to prevent any network interferences during the interview. The researcher transcribed the acquired data himself. One must mention that there were a few challenges in transcribing the recordings, as the interviews could be conducted at schools and/or office spaces. On the recordings, one picked up a few disruptions and noises in the background as the learners and other staff members were on the premises.

Some of the participants’ speeches were unclear due to the wearing of masks as a safety measure for Covid-19 and the transmission thereof. The participants’ abilities to speak English were not as fluent, as they stuttered (in search of the appropriate word) or code-switching, which refers to the use of Afrikaans or Setswana phrases. As previously mentioned, the researcher transcribed the acquired data himself. The researcher is proficient in Afrikaans, English, Zulu, Sesotho, and Setswana, which were languages that participants used.

The following extract serves as an example of how the transcriptions will be done:

Table 3.1 Example of transcribed interview between the researcher and the Principal of XYZ Secondary school.

Researcher:	Thank you once again for agreeing to have this interview. Can you kindly tell me what your position is in the school and what exactly it entails?
Respondent:	I am the principal of the school. So, I am like a general manager of the institution. So, it means that I ensure that the curriculum gets delivered and all the support that is needed for learners and teachers becomes part of my responsibility.

Source: Own compilation (2021)

3.7.2 Content analysis

According to Nieuwenhuis (2016:111), content analysis can be defined as a word compressing technique that is systematic and replicable. He added that this technique compresses words of text into fewer content categories that are based on the explicit rules of coding. Nieuwenhuis (2016:111) stated that content analysis refers to any technique that objectively and systematically makes inferences by identifying specified characteristics of messages. After the researcher transcribed the recordings, the content analysis served as the best way to objectively summarise the content of the recordings. One should mention, however, that the transcribed data from the recordings were not necessarily compressed or summarised in any way. The data were presented in the form of selective and axial coding.

3.7.3 Data coding

Nieuwenhuis (2016:116) defines coding as the process of carefully reading through the data and transcribing it into meaningful segments with symbols, descriptive words or uniquely identifiable names that are easy to analyse. This made it easier for the researcher to group all the concepts/idea/arguments with similarities. These were then also referred to categories to form related themes for further analysis.

3.7.3.1 Axial data coding

Nieuwenhuis (2016:116) described axial coding as a process of putting data together in a way that seeks to identify explicit connections between categories of data. This means that the researcher had to understand the data, and then explain how the categories are linked to present the information in a comprehensive manner.

The following extract serves as an example of how axial coding was applied in the data analysis:

Table 3 2 Table Example of axial data coding.

Reflective notes	Transcription of interviews	Codes
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Interviewer (researcher): 1.2) With regard to the appointment process of teachers in the filling of promotional posts: How do promotional positions contribute to the quality of education in the school?		
- Having the right person for the job. - Support and training. - Understanding and the positions. - Subject specialist. - Monitoring the work of subordinates.	<u>Respondents' responses</u> Respondent 1: It does contribute, but there should be a condition to it. It contributes if you have appointed the <u>right person to the job</u>. Because remember, if there was no Departmental Head, it was going to be difficult for the principal of a school to have a better understanding of every subject that teachers are teaching. But with a Departmental Head who <u>understands and who specialised in the subject</u>, he or she is <u>able to identify the gaps</u> in the teacher's knowledge and fill them in, in terms of in-school <u>support and training</u> for those educators. So, that person will also be able to realise if learners are given assessments that is standardised. But if the principals are alone in the institution, there are no Departmental Heads... everything could just move on as if it's okay and then we may realise that in the end we are not doing the right thing. So, promotional posts really assist a lot in strengthening.	The importance of promotional posts and its contribution to quality education.

Source: Own compilation (2021)

3.8. Validity/Reliability/Trustworthiness

3.8.1 Validity

According to Nieuwenhuis (2016:122), validity refers to the accuracy of the data, without any influence from internal or external factors. McMillan and Schumacher (2014:354) also referred to the validity of quality designs as the degree of mutual understanding and meaning in the interpretations of the participants and the researcher. The researcher also compiled patterned interview questions to ensure that there is consistency, and to record the interviews for transcription purposes. According to Breakwell (2006:247), consistency during the interview processes ensures validity by excluding personal bias. Any additional information was also taken

into consideration, although the primary focus was to answer the research questions that were provided.

According to Vockell and Asher (1995:87), validity also means that should the same test be used and/or conducted to the same sample on a different occasion, it will produce the same outcome. The researcher aimed to ensure the validity of the study by leaving an audit trail of the decisions and interpretations during the research process. According to Nieuwenhuis (2016:122), validation allows the reader to follow the process to establish whether it meets the requirements of valid research.

3.8.2 Reliability

In ensuring the reliability of the study, the researcher needed to be consistent during the classification procedure of the gathered data. During the coding process, the researcher made use of axial coding. As previously indicated, in axial coding, according to Nieuwenhuis (2016:118), the collected data seeks to identify the explicit connections between the predetermined categories of the information.

The reliability of the interview refers to the measure of consistency that is derived from the data. According to Nieuwenhuis (2016:120-124), reliability can be defined as the method of measuring the consistency of the data collection process. To ensure consistency and reliability, the researcher compared his findings to existing information such as the interviews, documents, articles, legislations etc. to check for any similarities in the responses from the participants.

3.8.3 Trustworthiness

According to Lincoln and Guba (cited by Nieuwenhuis, 2016:123), the trustworthiness of a research study is enhanced by the development of an early familiarity with the participants and the participating organisations. They added that well-defined, purposive sampling, detailed data-collection methods, and triangulation also play a vital role in ensuring trustworthiness. As previously indicated, the interview transcripts were saved to ensure an audit trail, which ensured the trustworthiness and credibility of the study. According to Cope (2014:189) rich quotes from the participants needs to be included in the data analysis, to display each emerging theme in the relevant data analysis chapter.

3.8.4 Triangulation

According to Nieuwenhuis (2013:110), the triangulation of data can be achieved by employing multiple sources of data collection. In this study, the researcher made use of documents, articles, government publications and semi-structured interviews. It is important to mention that the principles of traditional triangulation were not used in this study. However, because multiple participants were asked to reflect on the same issue, triangulation is applicable.

Figure 3.4 illustrates the process of triangulation, as depicted by Nieuwenhuis (2013:110):

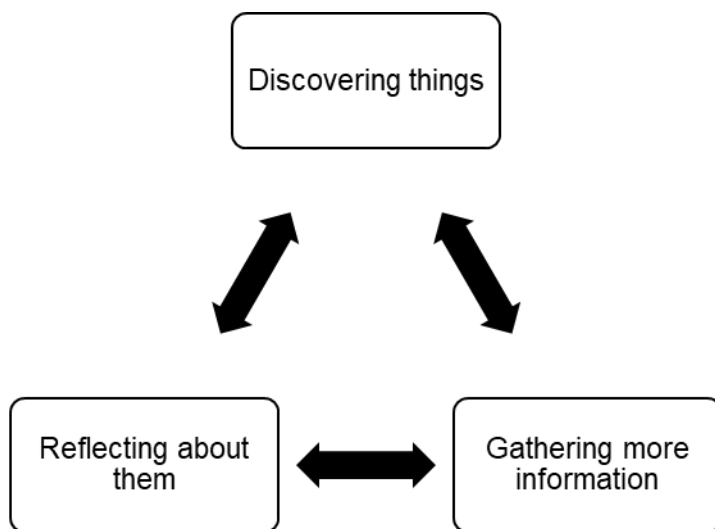


Figure 3.4 Triangulation of data
Source: Nieuwenhuis (2013:110)

3.9. Ethical considerations

According to Cohen *et al.* (2011:58), qualitative research has its advantages and disadvantages when it comes to ethical aspects. He stated that one of the advantages is the fact that one can observe the occurrences in their real setting. This means that one can conduct the interviews at the participant's workplace to gain a better understanding of the circumstances as described by the participant. When one considers this study, cognisance of the social aspects such as sensitivity and the rights of the participants needs to be taken.

Following the guidelines provided by the NWU Faculty of Education Research Ethics Committee, permission to conduct interviews with teachers at the schools was obtained from the District Director of the Department of Basic Education (see Addendum X for an example of the permission letter). Thereafter, the principals of the intended schools were contacted to request permission to conduct interviews with them and the specified stakeholders at the schools. Participants were given an information letter to brief them about the nature of the study and the intended questions.

The participants were also required to complete an informed letter of consent (see an example of the consent form in Addendum X)

Ethical clearance was obtained from the NWU Faculty of Education Research Ethics Committee, Potchefstroom campus on 25 May 2021. As indicated in Addendum X, the ethics number is NWU-01281-20-A2.

Cohen *et al.* (2002:58) stated that there must be ethical limits that the researcher makes when trying to uncover certain things. Because of the political nature of the study and the sensitivity of the information, the researcher ensured that the data would remain confidential and guaranteed the anonymity of the participants. One needs to protect the identity of the participants because they might be bound by a confidentiality clause at the school or the union itself. Furthermore, the researcher conducted the research under the ethical clearance of the NWU Faculty of Education Research Ethics Committee (EduREC).

3.10. Conclusions

Chapter Three focussed on aspects of research methodology and the methods that were employed to address the research questions in this study. The chapter focussed on the research design, the research methodology and the paradigm on which the study is based. The researcher also covered aspects related to data sampling, data collection and the methods of data analysis. The chapter concludes with a discussion on the validity, reliability, and trustworthiness of the study. Finally, a detailed discussion on the ethical considerations for the study was provided. Chapter Four aims to provide a clear disposition of the data analysis that was employed in this study. This analysis will include the explanation and application of the methodology of data analysis and the discussion of emerging themes regarding the influence of teacher unions on the appointment process of promotional positions at public schools.

Chapter 4: Data analysis

4.1. Introduction

The previous chapter provided a discussion of the qualitative research design for this study. In this chapter, the researcher provides an analysis and interpretation of the data, that serve to contribute towards answering the research questions on which the study is based. The theoretical framework that was provided in Chapter Two, and the research questions in Chapter One, led to the emergent axial coding of data, as described by Nieuwenhuis, (2016:118).

As such, the researcher aims to decipher whether there are distinct centres of power within the management and governing forces in the appointment of teachers for promotional positions, to

analyse the link between micropolitics and school governance in terms of activism and school leadership, to determine whether the perceived merit system still advances those principles of social justice and equity and to determine how teachers perceive the role of unions and related authorities in the appointment process for promotional posts.

Chapter Four will be presented in four parts. In Section 4.2, the researcher provides a brief disposition of the method of data analysis that was employed. In Section 4.3, a brief profile of each participant is provided from a phenomenological perspective. Section 4.4 focuses on the establishment of themes and the discussion of related sub-themes that serve to inform the influence of teacher unions on the appointment process for promotional posts at public schools, and in Section 4.5, a synopsis of the results will conclude the chapter.

4.2. Profile of the participants

The analysis is based on the raw data which was obtained from various educational stakeholders within the North-West province. The data in this analysis was obtained from the following target group:

A selection of three Quintile 1 schools was made where individual interviews were conducted with staff members of the following interest groups:

- Three school principals;
- One deputy principal;
- Two Departmental Heads – these are teachers who serve on the SMT as DHs for different subject areas;
- Two union representatives – these are teachers who serve as site-stewards for their respective unions.
- One SGB member who represents the teacher component of the governing structure.
- One SGB member – who serves as the SGB chairperson of their school and represents the parent component of the structure; and
- One Departmental official, who serves in the human resources (HR) department of the district.

During the data collection, the first question of the interview required the participants to provide a brief background of themselves, the positions they occupy, and their years of experience. The responses were used to briefly sketch their profiles. According to Dillon (2009:345), the presentation of biographical information is used to describe the participant and to provide an idea of the character of each participant.

Considering the nature of the study and the information that will be shared, the *noms de guerre* for the participants was kept at “Respondent”, with an assigned number. For instance, Respondent 13. Throughout the chapter, this approach was used in the interests of anonymity of the participants and the schools. Thus, no mention is made of people’s names, the names of schools, or even geographical locations.

Table 4.1 Respondent profiles

Respondent	Interest group	Affiliation	Years of Experience
Respondent 1	Principal	SADTU	- More than 25 years of teaching experience - 14 years as a principal. - Active union member. - Served on the top management structures of the SADTU. - Served on the top management structures of COSATU. - Active political member of the ANC at branch level.
Respondent 2	Union Representative	NAPTOSA	- PL 1 teacher. More than 10 years teaching experience. - Union site-steward for 4 years.
Respondent 3	Deputy Principal	SADTU	- More than 25 years of teaching experience. - 5 years as a deputy principal. - Active union member. - Former political leader.
Respondent 4	Departmental Head	SADTU	- More than 15 years of teaching experience. - 7 years as a departmental head.
Respondent 5	Principal	SADTU	- More than 30 years of teaching experience. - Served on different SMT positions. - Served as a departmental official as a subject advisor. - 7 years as a principal.

Respondent 6	HR Manager	District: Departmental official	- 11 years' experience as an HR manager. - Overseeing all HR and labour related matters at the schools in the district: i.e., provisioning and appointments; training and development, EAP services, and bursaries.
Respondent 7	Departmental Head	NAPTOSA	- More than 25 years of teaching experience. - 7 years' experience as departmental head.
Respondent 8	Union Representative	SADTU	- PL 1 teacher. - More than 10 of years teaching experience - Union site-steward for 6 years. - Branch level education convenor at the in the union: participates in Initial Teaching Awards organising team at sub-district level.
Respondent 9	Principal	NAPTOSA	- More than 25 years of teaching experience. - Served more than 5 years as deputy principal. - 2 years' experience as a principal.
Respondent 10	SGB member: Teacher component	NAPTOSA	- More than 20 years teaching experience. - 8 years' experience serving on the SGB.
Respondent 11	SGB member: Chairperson	SGB: Parent component	- More than 20 years of experience as an SGB member for various schools. - 11 years' experience as SGB chairperson for various schools. - Active political member: local leadership.

Source: Own compilation (2021)

A total of 11 people were interviewed for the collection of the data, and their knowledge, experiences and reactions will be presented in this section. The interviews that were conducted for

the gathering this data helped the researcher understand to the various factors that influence the appointment process which ultimately affect the education system. The views expressed by all the participants provided a scintillating picture of how the appointment process is flawed and challenged.

4.3 Establishing themes.

The information presented in Table 4.2 is the research themes and the codes that were formulated in the axial data coding- analysis. The themes play an important role answering in the fundamental research questions, as discussed in Chapter One:

- How do prominent centres of power within the management and governing forces in the appointment of teachers?
- What is the link between micropolitics and school governance with regard to activism and leadership?
- How does a merit system advance social justice and equity?
- How do teachers perceive the role of unions and authority in the appointment of promotional vacancies?

Table 4.2: Research Themes

THEMES	CODES
Determining the nature and importance of the appointment process of promotional positions.	• The perception of promotional posts at public schools. • The importance of promotional posts and their contribution to quality education. • Determining the structure of the panel in the appointment process.
The “string-pullers” and the “kingmakers” in the appointment process.	• The efficiency and transparency of the appointment process. • The conceptual role of teacher unions. • District centres of power within school governance and the appointment process and related activism.
The social identity of role-players in the appointment of promotional positions.	• The dynamics of SGB involvement. • The inimical role of teacher unions during the appointment process. • The importance of belonging to the “right” union • Affiliative advocacy and related “connections”.

	• The role of social identities. • The influence of appointing a maverick
Equality is not always justice.	• Virtuous policies and the merits thereof. • Democratic governance and its contribution to quality education. • Collegial contributions during the appointment process.
The disjuncture between policy and practice.	• The importance of policy interpretations and application. • The link between school governance and politics. • Improving the appointment process and the overall system.

Source: Own compilation (2021).

4.3.1. Thematic discussion

In this section, the researcher provides a discussion on the codes/sub-themes under the three themes that aim to answer the research questions on the influence of teacher unions on the appointment process of promotional positions at public schools.

The researcher also makes use of colours to indicate the directly quoted responses of the Respondents. Not only will this make it easier for the reader, but it will also present the raw data and true reflections of the respondents.

4.3.1.1 Theme 1: Determining the nature and importance of the appointment process of promotional positions.

The aim of this theme serves to determine how the concept of quality education is perceived from a school governance perspective. As indicated in Chapter Two, the researcher believes that the dynamics of promotional positions and school governance influence the quality of education, especially considering how quality serves as an umbrella concept that contextualises the phenomenon of education provisioning. The questions and answers provided in this section capture how the participants perceive the nature and importance of the appointment process for promotional positions.

The perception of promotional posts at public schools.

As a starting point during the interviews, it was important to establish how the respondents perceived the concept of a promotional posts at public schools. The respondents were asked how they would describe a promotional post to display their comprehension of the position. The respondents presented the following answers:

Respondent 1 described a promotional position as one that comes with increased responsibilities, as the position entails more tasks than a post level 1 position. Respondent 1 stated that a promotional position was part of the management team that implements policies and, “will assist in ensuring that the goals and objectives of an organisation gets implemented”. The respondent also alluded to the importance of these positions in providing support and mentorship in the development of fellow teachers: “He/she will be responsible for ensuring that there are monitoring programs, and there is also support that is provided for teachers who are teaching in that department”.

Respondents 2, 3, 4 and 6 alluded to descriptions provided in the PPM of the DBE. They mentioned that a promotional position is described as a higher post level, which is determined by the curriculum needs of the school. They also added that these individuals are generally appointed because, “they have the necessary skills, and expertise in a specific subject field. And they also have the responsibility to mentor and develop the other educators”.

Respondent 5 distinctively described promotional posts as, “a position where people have got the capacity to come and manage”. Respondent 5 alluded to how promotional positions are linked to the leadership capacity of individuals. Respondents 7 and 9 added that a promotional position describes the hierarchal system and organisational structure of a school, “that requires decision-making skills” under the specific roles and responsibilities as mentioned by Respondent 10.

The importance of promotional posts and its contribution to quality education.

In addition to determining how the respondents perceived the concept of a promotional posts, they also needed to explain how they think a promotional position contributes to the quality of education at a school.

Respondent 1 argued that a promotional post could only contribute to quality education if you had the right person for the job. Respondent 1 stated that a school should have someone “who understands and who specialised in the subject, he or she is able to identify the gaps in the teacher’s knowledge and fill them in, in terms of in-school support and training for those

educators". Respondents 2, 4, and 6 affirmed this statement by alluding to the fact that a person in a promotional post is there, "to monitor the work of colleagues, and for quality control".

Respondent 3, however, argued that the contribution of a person in a promotional position depended on, "the quality or the capacity of the person that gets promoted. If the person 'is sy sout werd' [Afrikaans: worth one's salt], "then it will definitely contribute to a better quality, or effective teaching". Respondent 3 concluded by saying that the person must have the will and bravery to serve in this position.

Respondent 9 believes that "the recruitment must be done properly. You cannot put someone there that cannot deliver. So, it's vital, and you must put someone there that knows what is expected of the post". This means that the recruitment policies play an important role in ensuring that the right person is appointed, which ultimately ensures that the person delivers work that contributes to the quality of education. In doing so, Respondents 5 and 7 alluded to the importance of good interpersonal skills that serve to empower others in the delivery of quality education: "I am using my experience, right. And when I use my experience, I then influence, right, and empower those under me... to do their job".

Determining the structure of the panel in the appointment process.

In determining the structure of the panel for the appointment process for a promotional position, respondents were asked if they knew who was responsible for the shortlisting of candidates. This question depended on an answer to be provided if they could not clearly indicate the stakeholders that were involved in the appointment process

In terms of the reflective notes, the respondents indicated that the shortlisting was done by the school principal and the SGB. They also added that the shortlist must have a minimum of three candidates, but it could not exceed five.

Regarding the composition of the panel, Respondent 6 indicated that the circuit manager assists the school principal and/or the SGB in the composition of the panel for the appointment process: "The circuit manager are responsible for monitoring the schools. So, together... It depends also on the level of the post. He will assist the school management to come with the panel, as to who will be the panel members".

An important point that was raised by most participants was that the panel remained unchanged throughout the entire appointment process. Respondent 8 stated that, "off course that's important that the same panel who did shortlisting, must be the ones doing the interviews". Respondent 2, however, mentioned that a union representative can be replaced, as they do not play an active role

during the appointment process: “The only people that can be replaced, say for instance I have Covid... is the union members. We can replace those”.

Furthermore (regarding the structure of the panel during the appointment process), depending on the answers to prior questions, respondents were asked to confirm who is responsible for selecting panel members and whether that process is fair.

The candidates mentioned that the selection of panel members is a fair process as it is guided by policy. Respondent 11 stated that “the department will issue out guidelines, this is what needs to be done”. Respondent 6 added that there is fairness and that besides for the SGB, the likelihood of there being more than one person from the same school is little: “Because remember, it’s about specialisations. So, they’ll look into other schools, for principals or managers who can come and assist in the interviews. And in cases they’ll also involve the subject specialists. There must be subject specialists who are dealing with that. So, most of the time there is fairness”.

Respondent 7, however, voiced discontent with the selection and/or inclusion of external parties to the panel. Respondent 7 mentioned the fact that, “someone from the outside does not necessarily understand what it would take”. This means that although the panel member could be objective, their decisions in the appointment process might not effectively suit the dynamics and culture of the school. Respondent 7 also had reservations regarding the inclusion of SGB members: “They are parents in our communities. They have no clue what it takes to be a quality educator. They also state that they can also be groomed by specific candidates, and I’ve seen it happen”.

Respondent 8 touched on the fact that an SGB would suggest that an independent panel be appointed because they are not capacitated enough to participate in the appointment process: “The SGB, they figured that they are not/ they are not having the capacity. it is whereby they can even ask the department to get them the independent panel to help with the interview”.

4.3.1.2 Theme 2: The “string-pullers” and the “kingmakers” in the appointment process.

The aim of this theme is to determine who the real decision-makers are in the appointment process. The researcher deciphers the dynamics of the stakeholders and their authority. The responses under this theme provide an idea of the extent of influence exercised by the various stakeholders during the appointment process.

The efficiency and transparency of the appointment process.

The aim of this sub-theme is to determine the exact stakeholders in the process, and what their roles are. The responses were mainly academic and interpreted according to the PPM and Circular 58 of 2020 - as published by the North-West province Chief Directorate for Human Resource Management and Development. Respondents had to indicate how they perceived the role of the SGB, and to determine at which stage during the appointment process teacher unions gets involved.

Respondents described the appointment process for promotional positions as one that includes the advertising of the post, which is published in the Gazette and allows eligible people to apply for the position before the set due date; the sifting process, which focuses on the disqualification of noneligible applicants for the positions; the shortlisting process, which is conducted by the panel according to the specific criteria for the position in that school; and the interview process, which is the final stage before recommendations are made for the eventual appointment of a candidate by the District Director, as explained by Respondent 6.

In terms of the stakeholders in this process, respondents mentioned the involvement of the Circuit Managers, the school principal, the SGB, and a subject specialist in the appointment of a DH. This person does not necessarily have to be from the same school. Some respondents also mentioned that an independent panel can be selected and/or appointed if the SGB of the school lacked the capacity to perform their duties effectively.

The respondents also mentioned the involvement of the teacher unions. Most of the respondents indicated the teacher unions receive a report of the sifting process that is conducted by the department: "So, number of applications were received. Out of them, so many of them did not qualify, and so many qualified. So, the union must have that report". However, they only become part of the appointment process when the shortlisting is conducted. Respondent 6 mentioned that, "the unions only get involved when it's at school". Respondents also mentioned that these unions are recognised by the ELRC.

The role of teacher unions.

During the data collection process, it was very important to determine what policy states about the role of teacher unions during the appointment process, and whether the respondents perceived it in the same way. Generally, the respondents indicated that the teacher unions are mere observers during the appointment process. Respondent 1 indicated that, "the role of the union was to observe and to ensure that fairness is maintained during the appointment process. The unions should sit down and ensure that there is fairness in terms of the process. From the side of shortlisting, until the side of interviews".

All the respondents echoed this sentiment – i.e., that union representatives are involved in the appointment process in an observer capacity. The respondents mentioned that the union representatives observe the proceedings to ensure that quality and ethical practices are followed on a consistent basis: “The union must also check whether the criteria that people are coming up with are fair; They basically there to see that justice prevails. To ensure that the process is fair. Fair, just process; The role of the union is only observer status; According to my knowledge, their role is to ensure that no one is favoured. They are the people who should be the most unbiased”.

Respondent 2 brought up an interesting term: passive and active observers. They suggested that even though they must write a report at the end of the appointment process, union representatives still opt to voice their concerns during the process. “I am an observer. But not just a quiet person. If I disagree with something, I have the right to object. You go into politics; we have what we call party agents. Party agents are also there, sitting and watching the whole process”.

District centres of power within school governance and the appointment process and related activism.

This code aimed to establish who exactly had the final say, or at least, who was the “string-puller” - if not the most influential in the appointment process of teachers. Throughout the interviews, the researcher first had to determine who the role players were in the appointment process. Thus, referring to the stakeholders such as the school principal, the SGB (especially with their eventual authority to make recommendations), the union (although they only serve as observers), and the District Director (as delegated by the provincial HOD).

Respondents were asked how they perceived the distribution of authority in the appointment process of promotional positions among the stakeholders. In clarifying the questions, the respondents were asked: where does this authority come from, and if anyone misused their authority during the appointment process?

Respondent 1 mentioned that the key lies in everyone knowing their roles; that way the distribution of authority does not become an issue: “Well, to me I think it's okay. Because I mean, the principal know that he's responsible for the day to day running of the institution”. Respondent 11 echoed this statement by adding that, “once each stakeholder understands their responsibility, then there is no conflict. The conflict arises when the teachers encroaches on the issues of governance, or the SMT encroaches on the issues of governance. And the SGB likewise”.

Respondent 1 went on to mention that problems arise when stakeholders condescendingly perceive their positions as superior to others' instead of empowering them. “Sometimes he undermines because he is so powerful in terms of the information. He doesn't realise that he has

got the responsibility to empower these people to also do their job. So, he should also see it as an opportunity for you to empower them, to avoid this micro-politics”.

Furthermore, Respondent 7 alluded to how the balance of authority is determined by the relationship between the principal and the SGB: “Because you find that if the SGB appointed the principal, there’s a good mutual understanding. There is minor disagreements, because they could see during the interview, we could work well with this person. Not maybe, but it ended up that it was their preference. So, if it works out that no, it is not, then there is already... They start the relationship on a confrontational, negative stance. But the way I understand how the SGB works, that’s why I’m very critical of it, is that they actually dictate, and the principal just has to accept”.

Respondent 1 further mentioned that the level of money at a school also determines the power dynamics within the SMT. The respondent stated that things at former Model C schools are dictated by the SGB because of their financial contribution, whereas, at a township school, things are dictated by the principal with their higher level of educational acumen. According to Respondent 1, education has become a socio-economic issue and principals usually exploit the ignorance of the SGB to serve their own interests: “I think the problem with this process of a principal outsmarting the SGB in terms of appointments and other things...uhm, normally comes when the principal’s interests”. In this regard, Respondent 11 argued that teacher unions are also known for using their knowledge to advance their interests: “Yes, the policy is very clear. It’s just that people prefer to interpret policy to suit their needs only. And that’s how teacher unions operate”.

Respondent 2 added to this narrative by stating that there are people who misuse their power. The respondent mentioned that if the principal is corrupt, obviously he/she will corrupt the SGB members: “For the SGB to be successful, it depends on the principal. I think the principal has more power. Because the principal is the accounting officer. The respondent goes on to mention that stakeholders have the ‘you scratch my back, I scratch yours’ – mentality. I’ve heard about a principal who was giving SGB members R2000 per month. Yah. Why? So that if I want something, I scratch your back, you scratch mine. They do it! It’s all about money and power”.

Respondent 3 took it a level further in arguing that one’s prosperity in the appointment process depends on who they know, and the financial incentive that goes with it: “From experience, you are a circuit manager, and you are related to Mr. X at that school. And Mr X at that school, wants to become deputy or principal or DH... promotion-wise. The respondent mentions that you use your influence with the people that can be influenced. We live in a corrupt world. It’s all about money, and gain. I start with money because most of us want cash. Money and gain. And that’s where things go wrong. It’s still rife. Meneer [Afrikaans: sir] if I make it happen, give me my R2000, every month. You say, no problem. And then they push you. And then you become that guy, in that authority. Departmental official, he smiles. He gets his R2000 every month”.

Respondent 10 answered from a perspective of union affiliation. “Remember, that’s why maybe I became a different unionist”. The respondent believes that one should belong to a strong union that has the authority to influence processes: “I become politically inclined to that organization simply because I have some interest in that particular party, you understand. And people will start to judge me. So, it works in the same way. if you are a member of SADTU, I think that is the policy of the ANC, you are a member of SADTU, so you should vote for the ANC.”

Respondent 4, on the other hand, was very reluctant to give their opinion on the issue of authority: “The authority is fair (doubtful)... But I think they’ve given too much responsibility to the SGB. Because I’m told that the SGB people are the ones who are making recommendations at the end of the day. I’m not sure (laughter). It’s a difficult one.”

Respondent 6 diplomatically indicated that the distribution of authority was fine as it was. The respondent ruled out the possibility of anyone misusing their authority in the appointment process: “No, remember, the principal represents the Head of the Department at school. So, that’s why if the principal has implemented something, which is not in line with the policy, you take that principal for disciplinary process. Where the SGB try to misuse their power... I think we have heard sometimes that the SGB of the school, sometimes are removed before their term.”

Respondent 9’s argument against the distribution of authority is based on the following: “For now, I say it’s not fair that parents have a bigger... they carry a bigger weighting in terms of the scoring in appointment. I feel it’s not fair.” Respondent 7 recalled what they had mentioned earlier about the SGB when asked about the distribution of authority. They stated the following: “No! I totally disagree with the distribution of power whatsoever because the people who have the most power and say, in the appointment is your SGB, (and you already know that I said, they are not the experts). So, that to me is unfair.” The respondent mentioned that the SGB’s ignorance was the reason for poor decision-making during the appointment process: “They should not have the final say, because that opens up the door to being corrupted by the suitable candidates. They definitely influence each other. But in my experience, is that they are just opposed in what they sometimes want for the school”.

Respondent 8 alluded to the fact that there is often resistance to change within schools: “You know some people don’t like change. and then some people feel that this particular person is now trying to, to be seen. You see, what do you call someone who wants to be a power monger...” The respondent added that authority is only effective when policy is applied correctly, and the interests of the child are placed ahead of personal agendas: “Because, you know what, in a very work situation, even if we don’t see eye to eye; but the main thing is the work. because of you at school we normally say to...whenever we are going to deal with the conflict, at some other school. we are there for labour peace. And then the main thing is that we are here with the business of teaching,

the child is at the centre. And then we remind them that, the person that's enters the interest of the child is of paramount importance.”

4.3.1.3 Theme 3: The social identity of role-players in the appointment of promotional positions.

As indicated in Chapter 2, the aim of this theme serves to supplement the reader's understanding of underlying theories that exist during the appointment of teachers. The social identity is buttressed on the idea that one's identity or that of an organisation, is defined by their social group or affiliation, which gives a sense of purpose. This theory helps us understand the principles of reciprocal collaboration and/or support between teacher unions and other educational stakeholders, especially in terms of the mutually beneficial aspects.

The dynamics of SGB involvement.

The researcher believes that with a discussion on the dynamics of SGB involvement, one can understand their role in the appointment process better and beyond the purpose of democratic governance.

Respondents were asked to share their thoughts on the recent proposals on the department's Draft Basic Education Laws Amendment Bill. The draft suggests that the SGB's authority to appoint teachers into promotional positions will be limited. This could mean that they will no longer have the authority to recommend candidates for promotional posts.

Respondents 1, 2, 4, 7, 8, 9 and 10 all agreed with this proposal. “I do agree with that proposal 100%; Yes, Yes! I 100% support it; Yes, 100%! I support it; I second it 100%”. These respondents cited the fact that SGB members lacked the capacity to make decisions on the appointment for promotional positions.

Respondent 1 cited that despite the supportiveness of their SGB, the low economic standards of the community means that the SGB lacks the proper educational background: “So, if the interview is to focus on the content of the subject, you will realise that the SGB is not capacitated to have that knowledge. They are not capacitated... it's not like we are saying... I'm not saying that they should not be trusted, but they are not capacitated”. Respondent 2 added that SGB members are not objective in their involvement and/or decision-making. They mention how SGB members have the tendency of having predetermined motives and that they advance their own interests: “They are like politicians. They have their person, which is what is happening at this school”.

Respondent 3 was rather dubious about taking a stance on the proposal: “I’m so cautious to say that, because in some instances, it works perfectly. And in other places, the opposite”. The respondent mentioned how they had been on the receiving end of uninformed and bias decisions made by the SGB: “I’m a victim of that. (chuckles). Of the SGB’s involvement. If you are not in good terms with the SGB, there’s no way that you gonna [going to] get promoted.” Respondent 3 also states that the SGB often make decisions that advance their own interests: “You know, it’s about favour for favour, and favour for favour...”

However, Respondent 3 also believes that the idea of removing the SGB, or limiting their power, would be digressive. The respondent mentioned that in the previous dispensation, the SGB was not considered or involved when it came to the appointment of teachers. “So, to answer your that one, it’s very difficult. As I say, depending on the context, I cannot say: No, take the SGBs. Because that’s also... we were there. The previous dispensation was like that. There was no involvement of the SGB.”

Respondents 7, 8, 9, and 10 who also agreed with the implantation of this Draft proposal, cited the following reasons: “you cannot put someone in a position to make an executive decision on an area that they have no idea.” This argument is based on the reasoning that some SGB members barely finished school or do not have the educational acumen to make those kinds of executive decisions. Respondent 7 also mentioned that SGB members are not always objective and make decisions based on popularity or their familiarity with the person: “And many times, what you also find is that those parents were taught by the teachers or those who apply for promotion. So that’s where the lines get blurred.”

According to Respondent 7, the SGB’s involvement in the appointment process is a disadvantage and an outdated narrative. The respondent mentioned that SGB members no longer fulfil their roles as proper governance structures but will jump at the opportunity of making decisions on key appointments: “I am not in favour of that whatsoever. There was an era in teaching where the parents played a role in the background. And with my experience is that they do not fulfil their roles anyway. They only fulfil their roles when it comes to having influence to appoint the person of their preference. But then they take a backseat... What about fundraising? What about maintaining the buildings? They don’t do their part.”

Respondent 8 echoed these sentiments. “I support it! because sometimes they become, they are so bias.” The respondent believes that the process will be much more effective if it is handled by the department itself or even the SACE. “This SGB, if they can be removed, because about two years back, I was attending the SACE workshop, they wanted to overhaul everything. SACE wanted to overhaul everything. So, SACE is going to be the one to do the employment process throughout.”

Although Respondent 9 also agreed with the draft proposal, the respondent argued that instead of removing the SGB from the process, it would be better if the scoring guidelines during the interviews were reviewed: “I won’t say take the parent totally out, but limit it, and say that more people on a higher level should score, like SMT, in the case of a promotional post; and maybe one parent.” The respondent believes that parents often don’t understand the expectations for a promotional position, yet the ratio of parents (SGB members) scoring, in relation to actual experts does not make sense: “I shall say, put a weighting to it, to say that it must be 20/80. So that when the scoring takes place, let the people that are qualified and professional carry a more... uh bigger weight in terms, and the parents then, a lesser weight.”

Respondent 6, who is a department official, was unaware of the draft proposal. The respondent mentioned that they had no clue of policy changes regarding the appointment of teachers: “No! They are the appointers at schools. The SGB? We hear from the SGB.” The respondent, however, did assert the fact that the department can dissolve the panel, if they become aware of any ethical discrepancies in the appointment process: “But, where sometimes, if at the district, as the manager, is not happy...maybe there is a dispute, now we can decide to dissolve that panel, and restart the process”.

Respondents 5 and 11 were against the draft proposal. Respondent 5 acknowledged that the SGB often lacks the capacity, but as fellow community members, they know the teachers better and only act in the best interests of their children: “You see, uh, I think it’s not correct. I’m not going to support it. Because the parents know these people, they know the teachers. They have the interests of their children at heart, you see. These parents, for example, they meet us in the township. They meet us from time to time. So, they already know who can serve better as the role model of their children.” The respondent further mentioned that more effort should be made in capacitating the parents, rather than omitting them from the process.

Respondent 11 expressed complete discontent with the proposal: “That’s nonsensical. You see, the SMT and the SGB work closely together. If we don’t get involved in promotional posts, there is going to be chaos at school.” The respondent cited that the motive behind this proposal is purely political: “So, my take is, that’s a no, no! The Department... this now, is not the Department talking. It’s the union talking. The union’s talking, because they want to place... remember in the ruling party, they said, all the organs of state should be flooded with their comrades. They should occupy each and every important... even at school.”

Although Respondent 1 agrees with the proposal of this amendment, the respondent also mentioned the possibility of a political motive behind the proposal of this draft policy: “But if we say that the Department must run this thing, the Department should ensure because there must also be a policy. Because the Department can also have their own interests sometimes of other people. Because there is no process where you will not have people who are having interests.”

The inimical role of teacher unions during the appointment process.

During the data collection process, respondents indicated what the conceptual role of teacher unions was during the appointment process according to policy. However, in determining the influence of teacher unions during the appointment process, the respondents were asked if these teacher unions fulfilled their role as observers during the process.

Respondent 1 indicated that the union representatives would want to provide their inputs during the process if they felt that the panel, especially the SGB, lacked knowledge on policy matters. They also mentioned that union representatives do not want to be passive observers because it does not positively contribute to the process. The respondent added that they would rather allow the unions the platform to provide inputs than to risk having the entire process reviewed at the end: “We can come and sit and watch, and write all your mistakes, then lodge a dispute. Are we assisting the process? Because once we lodge a dispute, the post is not going to be filled. So, allow us, when we see that you are not doing the right thing to raise it. Indicate to us that you don’t want to listen to us. We don’t have a problem, as long as at least you know that we raised our objection in the meeting. Because at the end of the meeting, there is where the union must sign, whether the process was fair.”

Respondent 2 mentioned that, “if everything goes smoothly, I keep quiet. But if something is not right, I raise my voice.” However, some of the respondents alluded to the risks of providing the union representatives the platform to provide inputs. They mentioned that the unions tend to overstep their boundaries and they try to dictate proceedings. Respondent 3 added that, “they overplay their role, sir... at stages. Whenever there’s a post, people start to meet and discuss. And then they decide, this is our person. And they’ll push for that person. Even if they have to throw their weight to make it uncomfortable for others, that have to make the decision. But it’s a matter of...they can intimidate you.”

Respondent 5 believes that school principals need to be strong leaders who know their policies well, that way there is no need to allow unions to give inputs during the appointment process. “You know why, né? [Afrikaans slang: isn’t that the case]. Because we have leaders or managers, like I said, who don’t understand their roles or responsibilities. The union, like I said before... then the union take over. Then the union takes over.”

The rest of the respondents maintained that teacher unions do fulfil their role as observers during the appointment process. The respondents also mentioned that the teacher unions were not allowed to give any inputs, because the panel has a resource person who would guide proceedings and address any uncertainties during the process: “We have never allowed that;

When you are in the interview, they are silent. So, it's very difficult to determine how they influence."

Respondent 8 added that they do not raise any concerns during the appointment process. The only time they would speak is when they sought clarity on matters: "We don't introject per se, we don't even interject during the interview. We even asked question maybe for clarity." Respondent 10 highlighted the fact that teacher unions can declare a dispute if they notice any discrepancies during the appointment process: "They don't. They lay a dispute."

The importance of belonging to the "right" union

As a follow-up to the question on the distribution of authority and identifying the various centres of power in the appointment process for promotional positions, respondents were asked about the role of teacher unions in this regard. The respondents were asked if there was any benefit in being affiliated with a union when applying for a promotional position. To further clarify the question, the respondents were asked if political affiliation and/or acumen counted for anything. Does the social identity of a candidate matter?

According to Respondent 1, one's chances of getting appointed should not depend on the union that they are affiliated with. However, they do bring up the aspect of proportional representation. The respondent alluded to the fact that the SADTU has the most members, and maybe that is why it seems like they have a hand in the appointment processes: "Maybe it could only be that sometimes a union with more members... It could also be interpreted as if those members are getting promoted because they belong to that member. (chuckles). But in terms of proportion (chuckles)... if you talk proportional representation... like if we speak about, if we are to be specific in terms of SADTU and the other unions. So obviously, it means that SADTU then, it's having the monopoly in terms of the membership."

Respondent 5 contributed to this notion by mentioning the development opportunities provided by unions. The respondent alluded to their career milestones which can be attributed to the developmental opportunities provided by their union: "Yes, it's beneficial. Because, let me tell you né? [Afrikaans slang: isn't that the case]. I'll give an example of my union. I'm a member of SADTU, but I've been a member of SADTU. So, SADTU has got this sort of developmental or empowerment project, that they do for their members." The respondent mentioned that unions use these development platforms to lobby and to encourage their members to apply for promotional positions: "I wouldn't have been in those processes if I was not a member of SADTU. Yes, it advantaged me. Because now, if SADTU has developed you, you can present yourself in any position. That's why you find that even some of them, in post level 1, will become even a principal

and beat all the deputy principals, people who have been deputy principals, who have been HODs, who have been, you know, you name it. So, that's why they can even jump positions."

Respondent 5 made the following statement: "This guy must be the principal because he's a comrade. You see? This guy is a comrade, he must be a principal. SADTU have always trained me that way. They have always said, Pa, we give you opportunities."

Respondent 1 also mentioned that in other instances, there are internal conflicts and competitiveness within unions. The respondent mentioned that in some instances members might not want to see their fellow members succeed because of the rivalry among them: "Some of them may not have an interest to see one of their union members getting through, you know. Akere [Setswana: isn't it] they are afraid that if they push it openly, those who are in there, they will write down that this person was influencing us, and there is action that is going to be taken against them."

Respondent 3 mentioned that the internal rivalry is of such a nature that fellow members would find ways to ostracise you if you do not do enough to assert yourself within the organisation: "If you are not a comrade, you put yourself in a disadvantage. You will really have to do more, so that you can enable those who represent you, to persuade the comrades that, this one is really better than that one. If people feel that they will not be comfortable with you as principal, because you are not aligned to one, two and three, you will not become principal. Because there's certain things that needs to be achieved, with the person who gets into that seat."

Respondent 5 contributed to this notion by stating: "But now, even in a union, there are those who are not principled. They are not principled; they will never see it that way. They'll twist arms, they'll twist arms. But for being, say, the chairperson of the branch of SADTU, on its own, it gives me a better chance, you see."

Another important remark that was made by Respondent 1, was the involvement of the department: "Also, the Departmental people who are in the panel can also have an interest." The respondent mentioned that departmental representatives who serve on the panel serve their own interests. Respondent 3 concurred with this claim in stating that, "unions and Departmental officials, they become friends. They become friends, for obvious reasons. As I've mentioned, if you are a SADTU member, SADTU is more influential. SADTU is more connected to these Departmental officials and what, what, what... And in terms of number and power."

According to respondent 2, if you are popular for being affiliated with a certain union, you stand a better chance at getting appointed: "Definitely. If you belong to a certain union, and you are known in the union, you get a certain advantage. You are one step ahead of the unknown guy. The respondent adds: let me give you an example, I'm known by all the principals in Area X. I'm a union member, I'm very active. Do you think if a post comes, they are going to give it to you?"

Obviously, they will give it to their member, that's what happens. That is why they say, you look out for your members. Go and represent, your members. Even if I don't answer my questions correctly, if they want me, they will take me. What happens in an interview, is not always the best man that wins the post. Like I said, we follow policy, but as a school..."

Respondent 10 also contributed on the issue of popularity and the affiliation. The respondent mentioned the following: "Because remember if you are in the union and it happens that you have a position in the executive committee of the branch and you are vocal at meetings, now people will start to fear you because whatever that you hint on they feel that you step on their toes. you kind of started to be, you know, taken seriously."

Respondent 3 was very diplomatic with the answer. The respondent started off by mentioning the advantages of union representation in terms of labour matters: "So, yes, affiliation can assist, so that obviously if you are a member of this particular union and they are there representing you; and then they can feel that something is not going... that obviously they will fight for you."

Respondent 7 echoed this sentiment in amplifying the fact that the union is there to represent their members on labour related issues. The respondent mentioned that the influence of unions comes from their prominent presence in the education sector: "My union played no role in really... for me to see that their educational power, that they can influence the process, or of you say, advocate for me in a sense that...uh, give our member a fair chance."

Respondent 8 contributed the following: "My role is to from time to time, is to make my comrades aware that we are not here to fight the management of the school. But the main thing is that labour peace, whereby they must do their work." Respondent 8 also added that as union site-stewards, their job is to advocate for fair labour practices and to actively address labour matters, which has nothing to do with the appointment process: "Now, take for instance you are being a labour matter, I mean you cannot even from time to time run to a lawyer. And then remember a union is a collective in the workplace. it can even bargain within the workplace."

Respondent 6 highlighted the fact that panel members and the union representatives, as observes, could lodge a dispute if they suspected any foul play during the appointment process. The respondent indicated the following: "It is not beneficial. Whether you are a union member or what, we go according to the person who meet the requirements. The person who proved himself, or herself, to be capable during the interviews. There is no way that the unions do influence the appointment process. Even if you are member of the union, even if they can say maybe they want me because I'm a member of the union, we don't work like that."

Respondent 9 had expressed strong feelings about how flawed the appointment process is and the influence of unions: "I'm coming from district, Dr RSM, where they said we gonna [going to] ensure

that comrades are appointed. And in every school, that I've seen, principals, deputies, SADTU member got promotional posts."

Respondent 11 mentioned the issue of union representatives exercising their influence on governance matters and the running of the school. The respondent stated that just the branch manager of the union is a teacher at the school. So, the dominant teacher union in the school (because of their numbers) tends to act superior even on matters that do not fall within their terrain: "Yah, the dominant teacher union in the school, they tend to act like... because they have a... I don't know, they would say a branch chairperson in their particular school. Like presently at the school where I'm chairperson, the dominant teacher union there is SADTU. Now, they want to act... they want everybody to hear from them. And because I don't take anything from them, I'm not a union member, I'm a SGB member. Now, there's always conflict between me and the union rep there at the school, you see."

The respondent also mentioned how these interferences start influencing the learners and contributes to the difficult governance of the school: "Because teachers, some teachers would want to influence learners against other teachers or the principal, if they don't want to... Because you know... no, XXX will tell you. XXX will tell you what I'm about to tell you. They influence learners against the principal or teachers they don't like. Yah, they do... they've done it more times than I can remember in that school. To me, it does not count. And it must not count to anything!"

Affiliative advocacy and related "connections".

Still linking with the idea of social identities and determining whether teacher unions always fulfil their role as observers during the appointment process, the respondents were asked if teacher unions were at any point allowed to advocate for their members during the appointment process. Some of the respondents maintained that unions are still not allowed to provide any inputs during the appointment process although the rest provided responses that indicated that there were discrepancies in the conduct of union representatives. Respondent 2 stated that, "I will not come and represent someone. I look at the process, I'm there for the process." Respondent 8 also added that, "no, you can't lobby, because that thing is a dispute on its own. And the next union can even lodge a dispute on the spot, and that process is going to be stopped."

According to Respondent 5 it is important that a school principal maintains their stance as strong and knowledgeable leaders. This reduces the possibility of unions imposing themselves during the proceedings: "If you are a good manager, actually it's not necessary for them to give inputs."

Respondent 1, on the other side, indicated that, "no, they are not allowed. But not being allowed does not mean that some cannot do it". The respondents suggested that even though policy does not allow for any advocacy, some people still try to bend the rules to push their interests: "My

experience is that while people may not say people by names, but in the process you're able to hear when people are debating that there could be a line that they are pushing." According to Respondent 7, "they are not allowed to advocate for their members, but in reality, it happens."

Respondent 3 argued that there is advocacy by unions during the appointment process. They argue on the basis that by being affiliated to a union, your chance of getting a post is better than other candidates: "Remember, let me put it this way... you have different unions. And every union wants their member. So, if your union, if maybe you have a weak union (chuckles), but you are a good candidate, it doesn't guarantee that you will pull through. Most of the time, SADTU members gets the post."

The role of social identities.

As indicated in Chapter Two, the discussion on the social identity theory is relevant to this study on the influence of teacher unions on the appointment process, as it conceptualises the underlying narratives behind coterie, teacher unionism and cadre deployment as concepts that describe the advantages of affiliation.

As such, respondents were asked if community membership is an advantage in the appointment process. For clarity, the respondents were asked whether being the son of the soil is worth anything. Does it count in one's favour to be a known and/or recognised resident of the community?

Respondent 10 very excitedly mentioned that being the son of the soil was advantageous in the appointment process. The respondent alluded to the affection that community members display when one of their own occupies a key position at a school: "Somewhere somehow, it does help to follow that perspective of the son of the soil. Simply pick you cause grew up in that community; people know you as you indicated socially, and you have the knowledge of the environment and the conditions of the society that you love with in that particular community. So, it then adds to an advantage to say, "but we have one of our own". For instance, we have a principal."

According to Respondent 1, advocacy for local teachers and/or people is usually done by SGB members. The respondent mentioned that SGB members are the ones who feel strong about having their "own children" in those promotional positions. Respondent 1 cites one of their experiences where the SGB were ill-informed about a candidate that they were mandated to advantage during the interview process: "And then they interviewed the first candidate, the second candidate... and then one of the SGB members was very much worried. And then he raised up his hand and said: Principal, when is our person coming? And this person, he was not aware that the other people were not lobbied. They were the only people who were lobbied. (laughter). And the

person who was observing (the union) said: Aow [Setswana slang: oh], even you? you also have your own person? And then it was very challenging..."

Respondent 2 mentioned that it would not make sense to take people from outside when you can appoint someone from their community. "Obviously, you are my bra. I will look out for my bra. That's how it is. If I'm from this community, I will take someone from this community..." The respondent also mentions that the son of the soil culture has been one of the reasons for the lack of diversity at schools, particularly at former Model C schools: "Do you think that the people in town will take me? A school like XXX?" [Name of the school intentionally omitted]. "No, they won't... why? Because I'm black. So why should I take a white person, if there are three black people that I know, are from my community. Does it make sense? We look after our children, that's how it is."

Respondent 8 on the other hand believes that chances for appointments are rather more inclusive in Area Y, than in other areas: "Like for instance, here in Area Y, we don't have cadre deployment. People from other cities are here as principals. Like for instance, people from Area Z are working here. Now, we, from Area Y, cannot apply for any post at Area Z. We don't get employed at Area Z. So there, they have got Son of the Soil. ...they only employ themselves there. Not here. Here in Area Y, we got everybody."

According to Respondent 4, being the son of the soil is advantageous and appointing these individuals is a good thing. The respondent reasoned that the appointment serves as a reward for their hard work at the school and in the community: "In the village that I'm coming from, that one I'm sure of. There are people who have been appointed.... Yes, they are locals, but they have been working very hard. Kore [Sepedi: the thing is], they contributed a lot, you know, to the school. So, I think there was just knowing that... you know, they could be excluded into that. Because really, they sacrificed a lot. Yes, so that is why maybe, them being the son of the soil it benefited them."

Respondent 3 mentioned how the son of the soil narrative has been a disadvantage for them. The respondent mentioned that some people become jealous of your success, which can count against you: "If you are, in a way, successful. Some people become jealous of your success. And that can count negative or against you. Look at him, he has this and that... that's what they are saying about me. I'm talking about myself now. He has this and he has that, and he's that... He's greedy! He even wants principalship also? (chuckles). Forgetting about, is this guy suitable, to deliver what we want?"

The respondent cited the fact that people know you on a personal level, and they can use their SGB positions to be vindictive: "Remember what I said, you'll get guys that were with you, but now they are your rivals... or now they determine your progress...(laughter)."

According to Respondent 3, the advantages and/or disadvantages that come with being the son of the soil are determined by the context of the school: “You can be a son of the soil, but you are not liked. And then you compete with also with another son of the soil. But you are better qualified, you have even...everything. When you put the two like this, on a scale, you can see ah... but for some other reasons, people will say, no! This is not merit, our choice... we rather go. How can we... that one is already...(laughter).”

Respondent 3 echoed the sentiment that being the son of the soil is not always advantageous and that people would prioritise their personal agendas instead. The respondent recalled the fact that they received a cold welcome when they were transferred to the new school as principal: “Then I came from XXX, I was transferred here. And I was wondering why this lady did not take her post, because I was getting some trouble and some resistance here. And then she told me, she got threatening messages from some of the SGB members. Because she had her own health issues, she decided to abandon the post, and go back to where she was. You see there. And now, that is not about the son of the soil. It is about personal interest, because I’m here, I’m the son of the soil. They are giving me the same trouble, even worse than what they gave to that lady.”

Respondent 3 also mentioned that being the son of the soil is not always enough. They mentioned that you need to have proper influential connections: “That’s why I’m saying it depends on your circuit. Contacts determine, is it going to be an advantage, or a disadvantage. But speaking from my personal experience, the fact that I am here, and I operate the way how I operate, in the community, some of these things count negative.”

Respondent 7 strongly argued that in most cases, the son of the soil advocacy is the reason for the appointment of incompetent people who eventually contribute to the dysfunctionalities of schools: “It’s a very old-school, very unpopular, very politically incorrect view that I have. But being in this teaching profession for years, it has done more harm than good... in my community!”

According to respondent 9, when it comes to the appointment process, more authority in terms of scoring needs to be given to the SMT: “That’s why I’m saying, let the process... let the SMT, let it carry more weight than the parents. Because the process, the loophole is created by giving parents more say, than the management”. The respondent believes that parents do not have the necessary acumen to match the level of authority they have in the appointment process, hence the bias and uniformed decision-making: “Because what happens now is, now we must look at the needs; we must look at the additional criteria. So, what is happening now, we’ll create additional criteria to accommodate the son of the soil.”

Respondent 11 argued that the needs of the school always need to be prioritised. The respondent mentioned that a panel needs to stick to the predetermined criteria, regardless of where the candidate comes from: “You see, the problem of the son of the soil, people who... we’ve got many, many right now who are son of the soil or daughters of the soil, who are not doing justice to the

children of the soil, in our local communities. When you excel, you know what you are doing. When you come from outside and you want to advise, they'll say, ah, what are you telling me, you find me here, you'll leave me here, because I'm the son of the soil. And look, if you go and check what the son of the soil is doing..."

The Respondent 1 also alluded to how the mission of appointing the son of the soil is becoming prominent within unions: "But I've seen also in the unions, where this debate is starting to come. And some of the leaders of the union, who happen to have been born in a particular place, they are also pushing for that." Respondent 11 added the following: "But teacher unions, when someone from outside is appointed, they will tell you, we've longer been here than you."

Respondent 1 indicated the fact that local union branches are populated by local people, who are now advocating for the appointment of local people only, and that some of the union leaders, who happen to have been born in a particular place, are also pushing that narrative: "Even in meetings, officially so... to say but you hear them. You go to a particular place, you hear people talking about: No, we can't have people coming from somewhere, coming in here. like last time I saw in one of the organisations I belong to, people were saying: why are we having principals coming from Area Y, coming to Area Y ens., you know... And I could see that this thing is becoming very serious." Meaning that people from Area Z cannot occupy promotional positions at schools in Area Y.

Respondent 10 also mentioned how union affiliation is beneficial when applying for promotional positions: "I will give you a different perspective of that one of a unionist or a person who belongs to a union (social identity). I will give you an example, one of the schools here, it is a secondary school it is happened like that way. Where the principal was announced way before the school was even built. By virtue of being a unionist. and he occupied a high position in the in the union at provincial level, simply because he knows policies and he's very vocal at the meetings and he is able to take cases head on with higher authorities then himself at the level of the district. And they know him because of, by virtue of having that position in the union at provincial level, and also having an advantage of attending even at national level; and also, by virtue of being recognized at national level. So, the name will be then known and that's then how it will then work to his advantage because of being a cadre."

According to Respondent 6, the only problem they have encountered regarding the son of the soil narrative is related to the general system and language policy of the school. The respondent alluded to a time after a school was built, and the community members challenged the department on the language policy that would be adopted at the school: "The only challenge that we did have, in terms of the son of the soil, it's where maybe we go to a school, then the community wants to take over, on how things should be run at that school, which was never agreed also upon."

The influence of appointing a maverick.

Furthermore, as a follow-up question, the respondents were asked what the chances for appointment would be if an outsider applied for a position. The respondents provided the following answers:

Respondent 1 suggested that merit prevails. The respondent feels that all appointments should be based on merit: "We stick to merit! Look, here, in this school...I'm having 4 or 5 teachers from KZN." The respondent argued that if community members have a strong desire to appoint local people, they should go out and recruit them. The respondent alludes to the shortage of eligible teachers and the poor recruitment policies at schools.

Respondent 3 agrees with the fact that appointments should be based on merit, and that your place of origin should not matter: "I Think the process has been fair enough. Because they were not looking at that thing of, you know, benefiting or like, the thing of supporting people who have been at school. They knew what they were looking for. If it's quality, then, that is what maybe they got. That is why they were appointing people from outside, not necessarily from here."

According to respondent 11, the academic needs of the school need to be prioritised. The respondent stated the following: "the needs of the school, academic needs of the school should be the first priority. Whether someone comes from Gauteng, overseas or anywhere, we first look what kind of... like I said in the beginning, what kind of person are we looking for? Both, as a person with character, and experience and knowledge of the subject content that we are looking for."

When the same question was posed at Respondent 2, who answered: "In XXX Secondary, I will say, if you are the son of the soil. Based on the issue of language; based on the fact that people from outside don't want to come here". The respondent mentioned how the contextual factors play a role in who gets appointed in that instance. The respondent ultimately stated that: "So, what... it happened in the past; we take outsiders, they don't... they can't last, they can't cope. They come here for a week, and then they leave. So, we know, at least, if you are from here, you know the problems; you know the children; you know the culture. So, let's rather take our children."

Respondent 7 mentioned that the outsider might get appointed but is not always welcomed by the locals: "Uhm, it's no very relevant that you ask the question, because our principal is now an outsider. And she's met with much resistance. So, in our communities, except for my case...in our communities overall, people would want someone that is familiar to them. And they are more drawn to the person that they are familiar with, than the person who has the merit and the capabilities to lead the school."

Respondent 9 mentioned that they were appointed as a principal but have been facing so many challenges: "Yah, that's me now. The outsider, that came in now. They protested. So, there was a

protest from... starting from November, December, January, February... So, I only entered the school in March. Now, I'm facing daily challenges, to say... uh, take for example, my two deputies were shortlisted. None of them got the post. I have to work with them. They are sons of the soil."

Respondent 5 bewilderedly indicated that: "I'm son of the soil. But still, they still want another son of the soil. Which son of the soil is it that they want? (laughter)."

Respondent 3 provided the following answer: "Sometimes, an outsider can be an advantage. And then, in our case now... The respondent also alludes to the advantage of being affiliated to a strong union and having good contacts. Now, because of union affiliation, because of connected family-related connections in powerful positions, we ensure that you gets the acting capacity."

Respondent 8 mentioned how conflicting situations can be when the SGB goes up against teacher unions regarding who should be appointed. The respondent stated the following: "I remember there was a school, the department had to intervene, have what you call a panel from outside, directly from the province to interview there; too short list; as well as to interview. Because there was conflict of interest. the SGB wanted this, and then cadre deployment was there. so now they had to take a neutral panel."

According to Respondent 8, "being a union member doesn't guarantee you a position. I think it depends on the dynamics of the particular structure. Because I mean even if you can be a comrade, it doesn't guarantee you that you are going to be employed... I mean right now since I've been on the branch from 2015, I am still a PL 1. So, there is no guarantee that being on the executive automatically you are going to be promoted."

Respondent 1 interestingly brought up the fact that some unions members tried to establish an SGB forum: "I met with one SGB chairperson of one of the schools, I will not mention... and there was one leader of the union spoke to this chairperson of the SGB to say: you know what, we must formulate what they were calling SGB forums. They are more forums in Area C, SGB forums. Those things are not necessarily in the policy. It's like your gangsters... I call them gangsters. You must have a forum of SGBs, because in this forums, we'll be able to ensure that the sons and daughters of the soil are appointed. And they wanted to start it here. And there was a meeting that was convened and some officials of the Department got into it."

Respondent 1 also mentioned how the inception of this organisation led to interesting revelations: "I sent them an SMS myself. And I said, I never thought you'll stoop so low as officials of the Department, to go to a meeting that is going to encourage forming a gangster... that does not even exist in terms of the law. And they withdraw... they had to withdraw from that processes. And this person says to me... I said, but why do you need a forum? They said, no, I thought it was your organization that needed this thing. Which organization? He said SADTU. What is SADTU for this one? And then he mentioned somebody, who I knew, once led, but he is no longer in the

leadership of the union, who was passionate about this sons and daughters of the soil. And we kept on telling him that this thing of yours is not going to work.”

4.3.1.4 Theme 4: Equality is not always justice.

The focus of this theme is aimed at determining the nature of policies and practices that promote meritorious standards in the appointment process. The answers that were provided in this section indicate the dynamics of upholding policy and prioritising the needs of the school by making suitable appointments.

Virtuous policies and the merits thereof.

The sub-theme: virtuous policies and the merits thereof is inspired by the fact that despite the disjuncture between policy and practice, educational stakeholders need to acknowledge the contribution and the importance of educational policies towards advancement of the educational sector and the delivery of quality education. Moreover, when it comes to determining the influences in the appointment process of promotional positions, it is important to understand what role teacher unions play in promoting those policies that advance national principles.

In the backdrop of social justice and equity, the respondents were asked how they perceived merit. Respondents were also asked to provide their opinions on the role of teacher unions in promoting social justice and equity.

Respondent 1 mentioned that there must be a very good reason for the appointment of someone merely for the sake of equity. He argued that good candidates cannot be overlooked just because a school needs to adhere to aspects of equity: “The vacancy needs a person to execute the duties that they’ve indicated there”.

Respondent 3 mentioned that the compromise of policies depends on the context of the school and its related needs, and the dynamic of the SMT. The respondent added that the variables that determine the compromise of a policy, allow the school to find justifiable loopholes for not to follow prescribed policy guidelines: “Policy isn’t everything. It’s there, it can work, for best. But unfortunately, if you are allowed to get away with some of these things, although policy stipulates one, two and three, but there’s a way that you can manoeuvre...”

According to Respondent 2, policy is often used as a tool to promote exclusivity. The respondent mentioned that sometimes a post would be advertised in a way that exclusively benefits people from the North-West province. This means that if one were from a different province, chances of getting appointed for a promotional post in the North-West province are low: “Sometimes they will

say, no, it must be within North West. We are not taking outsiders. Yah, it is so exclusive. Like I'm saying, it will tell you, okay, we give preference to a disabled or a female, etc."

In terms of meeting equity standards and/or targets, Respondent 4 echoed this statement by stating that most schools try to ensure that they meet their equity targets: "They are trying to balance that one, so that at least both genders can be equally represented. Responded 1, however, mentions that the policy should not be used as a means to explicitly disadvantage others or to justify incompetence. Equity must not be used as an excuse for less performance. It's just to balance things, but it's not like the person that we are giving is less capable."

Respondent 5 believes that SGB members should use these kinds of policies to their advantage. The respondent mentioned that the SGB, and unions should groom and/or lobby for candidates who fit the profile described in the policies advocating for social justice: "If a post has been advertised, you as the SGB, because the post cannot be advertised without the knowledge of the SGB. The SGB must recruit, and they must lobby, I believe in that. The union must lobby, né? And say, men, we want a good person in that position. Go and apply; bring your application, we must check it". The respondent mentioned that the Employment Equity Act (55 of 1998) should not be used as a tool to disregard quality people just for the sake of affirmative action: "Because the person must have capacity. What if it's only one woman there? Then it means automatically she's in. Many have fallen into the trap, that trap, you see? Even if you look at it, it's the problem that we have in our country."

Respondent 6 mentioned that they have a good relationship with the unions and other stakeholders. The respondent added that they involve them in everything that the Department does. "Any policy that come into practice, is negotiated at ELRC. Where unions are represented. So, they agree with what is going to... any amendments that is going to take place in the department, before it's being implemented". The respondent went on to mention that teacher unions also want to play their part in improving the education system, thus, they need to be consulted and informed about any developments in the sector: "If you are trying to implement something which is not in line with the policy, it's where now, the unions are taking us on."

Respondent 8 emphasised the fact that equity should not be more important than capacity and/or competence. The respondent mentioned how, in many instances, people would be appointed for the sake of meeting policy targets, and not because they meet the requirements: "It has even downgraded our education system, because of the gender sensitivity."

Respondent 7 expressed their discontentment with policy: "Merit is definitely not applied. The respondent mentions how policy was disregarded to their detriment of their ambitions. I'm telling you from personal experience. The last interview I had, we were five shortlisted. 4 female candidates, 1 male candidate. Who got the post? Let me leave it up to you...the male!"

Democratic governance and its contribution to quality education.

When the respondents were asked to share their thoughts on the recent proposals on the department's draft Basic Education Laws Amendment Bill, they indicated their various stances on the proposed policy. After doing so, the researcher asked to what extent they thought, this draft policy would influence the appointment of promotional posts and the quality of education at schools.

Respondent 1 suggested that the policy would be beneficial to the education system: "They mention how the margins for error will be reduced when it comes to appointing suitable candidates. I think you'll be able to have people who are relevant in terms of the sector". The respondent also mentioned that although the SGB makes recommendations, the department is the eventual employer. The respondent stated that the SGB is not necessarily the employer, and to ensure more accurate appointments, the employer should handle the process themselves. This will avoid blame-shifting scenarios and situations where SGBs constantly have court cases against the department. "Remember the SGB are not necessarily the employer. I see in companies, the people who interview people... isn't it that the employer must get the right people for the job? So, the employer does not blame anybody because they are the ones that identify. So, the SGB is just a governance structure."

The respondents who agreed with this draft policy also cited that the decisions taken during the interview process would improve as that authority would be in the hands of knowledgeable people. Respondent 3 stated that the point of reference in the decision-making of SGB members who lack the capacity is always from a perspective that is driven by ulterior motives. The respondent added that SGB members serve their interests and forget about the actual client, i.e., the learners.

Another point that is brought forward, is the fact that in a disadvantaged community, a 3-year SGB term is not enough time to educate them on educational aspects related to the appointment process for promotional positions. Respondent 4 stated that: "I mean if they are educated, if they have enough information, obviously they will make the right decision. They will recommend right. And then once they recommend right, that will impact positively for the school. But if they are not educated, then they are not going to assist the school with anything anyway..."

Furthermore, in terms of how this policy would contribute to aspects of democratic governance and the quality of education, Respondent 5 mentioned how this policy would contribute towards making jobs more accessible from a teacher perspective. The respondent argued that the involvement of SGB members in the appointment process, is the reason why former Model C schools still lack diversity in terms of the demographics of teachers.

The respondent argued that the department intends to use this policy as a tool to reduce the authority of SGBs at these schools: “What leads people to that, is because of how it’s manipulated in the former model C schools, the advantaged schools, the town schools. Because there, what they do... you know, it can be manipulated by racist SGBs. what leads people to that, is because of how it’s manipulated in the former model C schools, the advantaged schools, the town schools. Because there, what they do... you know, it can be manipulated by racist SGBs. When they say, we don’t want a black person for this school. We don’t want a coloured person for this school. Or the coloureds will say, we don’t want whites here, we want... you see there. So, then it affects the quality because they don’t look for quality. They are looking for the skin colour.”

Respondent 10 believes that by removing the SGB from the appointment process, you would be exposing unpleasant and complicated things. The respondent mentioned that for now, although union representatives declare their interests before the process starts, there is still a degree of lobbying that occurs behind the scenes. Thus, by removing the SGB, things will be made a lot easier for unions to engage in dodgy dealings: “So, these people they have this tendency of having an interest in a candidate. Even though they have declared. but behind the scenes they lobby and show interests or express interest. So, by taking out the SGB now you are opening a can of worms.”

According to Respondent 11, “all that the department needs to do is to capacitate those that they think are not capacitated.” The respondent mentioned that the department needs to be efficient in providing training for newly elected SGBs, to avoid exposure to the appointment process while they lack the necessary knowledge.

Collegial contributions during the appointment process.

Considering the possible reasons for the proposed omission of the SGB from the appointment process, as indicated in the draft Bill of 2017, the respondents were asked whether union representatives were consulted during the interview process. The code: collegial contributions during the appointment process is based on the notions that SGB members might not have the required knowledge on policy aspects and that perhaps unions, as educational stakeholders and active observers, could be consulted on the latest policy matters that the SGB and other panel members were uncertain of or sought clarity on.

Respondent 1 indicated that a panel always has a resources person, which in most cases is the principal. However, they also mentioned that the resource person might not know everything, and

that would leave the option of consulting the union representatives: “They must rely on the resource person. They must rely on the resource person! The resource person can also be limited in how he/she is resourced. Because you know I have realized that people are not necessarily reading on a daily basis.”

Respondent 1 also alluded to how the resource person misinterprets policies, and because unions are involved in the consultation process before the implementation of policies, they have a better understanding thereof: “There could be something that I’ve seen the resources person misinterpreting that equity thing that I was talking about. And in some instances, we had to say to the resource person that no, no resource person, that is not how it is done. Please, if you don’t agree with us, we can adjourn. Phone your seniors and ask them, they will give you this indication.”

Respondent 8 mentioned that as a union representative, they do not speak to the candidates but provide advice to the panel on matters they might be neglecting: “No, we ask only the panel. We don’t even ask the candidate anything. We are just there to observe the process, and then after that process we can even advise. we can advise them that you know what, we see that in your SMT, there is only one male, why don’t you balance the gender dynamic?”

However, Respondent 1 went on to mention that procedurally the union representatives will only intervene when they realise the involved SGB member is not doing things correctly. Besides that, the SGB does not explicitly request assistance because they should consult their resource person.

Respondent 9 also believes in allowing union representatives to provide inputs only if strict guidelines are communicated prior, otherwise they might misuse the opportunity: “They must put more stricter measures in place, that will guide the panel, to say this is what is allowed, and this is what not allowed. I don’t think that is the intention, but people are overstepping their boundaries. Not knowing, I’m overstepping.”

According to Respondent 3, if your union representative is not knowledgeable and/or brave, you do not stand a chance of getting the position. They referred to the intimidating and/or manipulative practices that occur before the interviews take place. The respondent uses the example of the SADTU being as reputationally dominant as the ANC and their ability to boss the proceedings. “Your union representative, if he doesn’t know his policies and he’s not strong enough, and even brave enough, because SADTU is like ANC members. They come with that ‘om te sê’ [Afrikaans: to say], we are in charge; heh chief, we are in charge.”

Respondent 5 mentioned that the consultation during the interviews is not the real problem as most of the manipulation and lobbying takes place behind the scenes. The respondent mentioned that unions are not allowed to give inputs, but they are very influential: “They can lobby, behind the scenes. You see? They can lobby, so and so must come in, It’s the process that can be manipulated. It’s open for manipulation”. Respondent 10 echoed the sentiment that once unions

have enough information of the candidate they lobby for them: “I think by virtue of having a competitive union that is competing with SADTU, we are now on the road of dealing with such case where they advocated or lobby for someone.”

Respondents 6, 7, and 11 are against the idea of consulting union representative on anything during the appointment process. They maintain that union representatives are mere observers. Respondent 6 mentioned that the SGB has no reason to consult the union, as training is provided before the appointment process starts: “Before any shortlisting are done, circuit managers or if the circuit manager of that school is not there, there is somebody who is going to represent the department. Where he is going to train the SGB on what is needed.”

According to Respondent 6, if the SGB is not confident in their ability to participate in the appointment process, they would allow management to oversee the process: “You will find that at times, the SGB will say, but we do not have the capacity, let’s give everything to the management of the school, to run the process. They’ll be just, also be there as observers.”

Respondent 7 also mentioned that the departmental official is there to assist when the SGB is unsure of policy matters: “That’s why the Departmental official is there. The Departmental official is there to be a so-called expert on the policy. Unions are basically focused on labour related issues.”

Respondent 11 argued that there is no need to consult union representatives, as SGB members are not entirely clueless. He mentioned that not all SGBs at public or township schools are useless when it comes to policy matters: “And one union member, I think it was NAPTOSA, came to me and said, and asked me, who am I; where do I come from; where do I get this kind of experience; the type of questions that I was asking... he wanted just to get whether the principal coerced me into asking those questions, or whether those questions came to me. He adds that union representatives would love to hold the advantage over SGB members despite the available solutions. Now, they would gladly receive an SGB that does not know its role. The teachers... the teacher union, they would...ha-ha banga jabula [Zulu: they would be happy]. They would be grateful. That would be playing into their gallery.”

4.3.1.5 Theme 5: The disjuncture between policy and practice.

As indicated in Chapter Two, whenever there are discrepancies regarding the functionalities of a profession, the first point of reference is the policies and how they are implemented. The theme focussing on the disjuncture between policy and practice is aimed at providing the reader with information that they should take cognisance of in reflecting on the development of teachers and promoting merit-based appointments that reflect the efficient implementation of education policies.

This discussion also allows us to find logical explanations as to why policies are compromised, and how the ends justify the means.

The importance of policy interpretations and application.

Regarding the importance of interpreting and applying policy, respondents were asked to comment on whether there is a disjuncture between policy and practice when it comes to the appointment process and school governance in general.

Unlike all the other respondents, Respondent 6 stated that the probability of any disjuncture is low as the key lies in sticking to what policy tells you: “No, it’s unlikely because normally we stick to the policies.”

However, according to Respondent 2, the disjuncture between policy and practise occurs because people tend to bend the rules: “As people we tend to bend rules. But if you follow policy, you are always safe. And if you follow policy, you are not lying, you are doing what is right”. Respondents 8 echoed these sentiments, by citing the lack of capacity as a reason for the disjuncture between policy and practice. “They don’t even know policies that need to be applied. So, we are talking about capacity.”

Respondent 1 argued that if everyone received proper training, there would not be any disjuncture. “You must ensure that your members, understand the constitution the same way. And that we can do through training and advocacy... serious advocacy”. The respondent also mentioned that the department should offer training sessions to all stakeholders when new policies are introduced and that the importance of having dialogs to ensure that people engage on how they perceive policies: “Take all these stakeholders who are coming from different constituencies: the unions; the SGB; even the Departments. Go through every sentence, every word. Allow them to express their understanding, and finally say, this is the understanding or the correct interpretation.”

Respondent 4 also mentioned the importance of having workshops before policy can implemented: “Education papa... I think there should be a stage where we’re having like workshops. So that people can be like, made aware of what is happening. Uh, the policies must be well explained to people so that they understand them.”

Respondent 3 believes that policies are interpreted so diffidently because of how it is communicated to the various stakeholders: “Your communication of your policy must be so specific. The language that you are using there, so that interpretation... so that it shouldn’t be interpreted in different ways”. The respondent added that this gap is usually exploited by union representatives: “That’s why I say, capacity of your union representative is very key. He can play around and manipulate all these people. That’s why I say, train them...these SGB members.”

Respondent 5 concurred with this, believing that the ignorance influences the confident with which stakeholders do their work; hence, the disjuncture between policy and practice: “But it’s very rare that we have people with strong morality, strong ethics, strong principles. And also, because people lack with bravery, lack bravery. People are not brave; people do not have the courage to implement”. The respondent added that it is these instances that allow people to be manipulated during the appointment process: “It’s something that takes a lot of courage, because then they, some of them they may even victimise you. As the principal, they may make your school ungovernable. Because they’ve got members there, and make sure that let’s get the principal that we can manipulate. So, it takes a lot of courage to stand up. It takes a lot of knowledge. Know what you are doing; you must know what you are doing; you must be informed; capacity, you know. So, that’s why there is this disjuncture between policy and implementation.”

Respondent 7 confidently stated that there is a disjuncture between policy and practise because of how rigid policies tend to be and the fact that people advance their own interests in the appointment process: “Policy...there’s definitely a disconnect that I can state right off the bat. Because what you find that policy is there to guide all of us, but it depends on the character of the people who must implement this policy. And unfortunately, favouritism is alive and kicking. And like I said, I’ve been a victim of it, so I know.” Respondent 10 added to this sentiment by stating that: “as I indicated in the past. where this other union, that is a big union, they used to lobby for their candidates and that's where principles would then manipulate the SGB to pull with them in that regard.”

Respondent 9 mentioned that the disjuncture occurs because there is uncertainty regarding the roles of the various stakeholders. They mentioned that the lines between curriculum and governance matters are often blurred to advance personal agendas: “I don’t think they don’t know how to apply it. I think they just overstep their boundaries, and they just feel that, now you know...when it comes to post né, whether we like it or not, the SGB will be influenced; The parents will be influenced; Uh, the unions will be influenced.”

Respondent 11 contributed to the argument that stakeholders do not know what their roles are, and that this often leads to internal politics where stakeholders counteract each other’s contributions in the running of the school: “This disjuncture is caused by the mere fact that we are not always at school. And with regard to implementing things... when you have a hostile SMT, when wrong people have been elected into positions... uh, those promotional posts, and they are in the SMT, they will sabotage the program of the SGB.”

Ultimately, the respondents were asked what could be done to ensure proper implementation of policies at schools in terms of the appointment process. Respondent 2 indicated that policy is meant to protect stakeholders. He argued that if policy was followed, there would be minimal challenges in the appointment process.

A surprising contribution was made by Respondent 6 who acknowledged that in the North-West province, the issue of equity has been a huge problem in the appointment process for promotional positions. The respondent added that the district and probably the province did not have a clear policy on equity: “Honestly, equity is a challenge for us. But we are trying by all means to balance equity in the Department. We don’t have approved policy. What we have been doing, we have been taking the best candidate.”

Furthermore, according to Respondent 9, the disjuncture between policy and practice can be resolved if the focus is on recruitment policies: “I believe that who should be recruited, what I want for that post must come from the management level.” They added that the balance of authority during the appointment process should also be looked at: “Scoring should weigh more from SMT’s side, to show that proper recruitment is done. So that service delivery in terms of quality teaching must take place. Now you give more weighting to the parents, you put two experts on the panel, and three parents.”

Lastly, Respondent 9 maintained that the best way to eliminate the disjuncture between policy and practice is for the department to capacitate the stakeholders so that everyone understands their roles: “Now, all the department has to do, is to capacitate. Now, the disjuncture can be caused by various things, but the main culprits will be the people who must implement policy.”

The link between school governance and micro-politics.

As explained to the respondents, the question on the link between school governance and micro-politics could be perceived from the following perspective: The term micro-politics could be interpreted as the conflicting differences between stakeholders at the school; the kind of conflict that sparks power struggles among individuals and eventually influences how the school is governed. However, the respondents also interpreted the questions from a different point of view, which was expected and still contributes to the theme. The other perspective was political affiliation. This perspective probed the extent to which the governance of a school is influenced by orthodox political activities and affiliations.

“The politics are there because there is a thin line between professional issues and governance issues.” In this instance, Respondent 1 explained that micropolitics are often inspired by the fact that people do not fully understand their roles. The respondent added that the problems occur when stakeholders encroach on each other’s jurisdictions in terms of their professional responsibilities. This means that the problem starts when governance (the SGB) started interfering with teaching and learning issues: “When they also want to come and deal with issues of teacher performance as governors, when it’s the responsibility of the teachers. But again, the principal

sometimes, you know, not showing respect sometimes for the people who are in the governing body.”

Respondent 1 also brought forward the fact that principals do not respect the governance structure of the school. Various factors could attribute to this perspective: “But again, the principal sometimes, you know, not showing respect sometimes for the people who are in the governing body.” Respondent 11 related to this sentiment by stating that, “many teachers do not understand their role as teachers at school. And they misinterpret the governance structure.” The respondent cited the fact teachers often do not understand the role of the SGB and underestimate their capacity, hence the disregard: “The micro-politics that you are talking about is when they are trying to push their agenda... Now, these micro-politics arise from the fact that these ones don’t understand our mandate.”

According to Respondent 2, everyone is out to serve their own interests. Respondent 1 echoed this sentiment in stating people, for instance, want to be elected to the SGB for financial gain. “People who get elected in the SGB and know that the schools are getting some money...and they also want to benefit from the money.” The respondent added that SGB members want to have a say in who gets the tenders and do not care about aspects of conflict of interest: “Like when there are contracts, they want to have somebody that they are the ones who are bringing, so that they are able to also benefit from that contract themselves, you see...”

Respondent 7 also alluded to the fact that stakeholder would prioritise their interests above that of the school to benefit themselves and their associates. The respondent argued that stakeholders do not really have the interests of the school at heart but rather what the school can offer them: “I see that not many people, or not may stakeholders really have the interests of the school at heart, it’s what the school can offer them. And then they link up with educators or managers on different levels that will help them to promote their agendas, because it would be mutually beneficial to them, that’s what I think.”

This argument is substantiated by Respondent 5 who mentioned that governance is about resources, and these resources cause power struggles: “And then, in that sense, there is this power struggle, you see. That I want to be the chairperson, you see... I want to be there, so that I can influence, and get some tenders, né. Because there is money also involved.”

Respondent 3 added that people want to be in these positions of power to dictate matters in a way that serve their interests: “It boils down to that... I want to be the chairperson, so that I have the powers of the chairperson. Then you start to influence...in that direction, in order to get there. It doesn’t matter what means you are using, with your influencing process...(chuckles).”

In terms of influencing matters, Respondent 5 mentioned that school governance can also be influenced by external politics and affiliations: “Governance is political. It’s very much political. In a

sense of political parties, that will put it there. Political parties. This political party wants to the following, it has got its own manifesto. And then, therefore, it goes out and lobby.” The respondent argued that a political party has a manifesto; therefore, it goes out to lobby for people that advance the interests of the party: “So as soon as that political party comes in, the political party must make sure that the manifesto, which is the promises or the commitments they’ve made, to the community are fulfilled. we shall govern in all spheres of society.”

Respondent 2 also cited the fact that professional jealousy plays a role in the micro-politics that occur in schools: “If you do your work, they don’t like you. If you dress in a certain way, ‘jy dink jy’s beter’ [Afrikaans: you think you are better]. I’ve been a victim of all this, so I know about that”. Respondent 8 contributed to this statement by indicating that, “sometimes happened that at some schools, these people (the staff) is not in good terms with this particular person who has just been promoted based on their have conflicts of the past. It can be that people we’re having interests in that particular post. Now internally somebody got that particular post. Yes, there’s that competition among each other!”

Respondent 4 brought forth the fact that micro-politics can also be caused by ignorant decision-making and a lack of communication: “Where maybe somebody decides to do something without maybe, informing others. Or somebody doing something without following the right procedures. Or the correct protocol.” A lack of communication and the inability to follow the correct protocol or procedures contributes to people having differences.

Respondent 6 indicated that they could not provide a clear answer, but they acknowledged the fact that people use their authority to exploit situations for their benefit: “There is such challenges that we do experience, that maybe some of the principals, some of the school management, they’ll try to favour somebody, on top of somebody. That’s the politics of the school. But when this is brought to the attention of the district director, it is addressed according to the policy.”

According to Respondent 7, “there are many stakeholders, and it depends on the influence and the power and the connections that these stakeholders have.” They mention that micropolitics is based on populism: “For whatever the reason, they will spread rumours about you. They will sabotage you, in order to make you look bad. And unfortunately, people link up with people that they feel are like-minded. So, they are very influenced, they are influenced actually by what they hear and what they say.”

Improving the appointment process and the overall system.

The final question during the data collection phase was a rather open question. The question depended on the answers that respondents provided. This question aimed to help the researcher formulate informed recommendations in the discussion of Chapter 5.

One of the questions that the respondents were asked, was whether they knew of someone who has been advantaged and/or disadvantaged by any influences in the appointment process for promotional positions. The other question that was posed was whether they could mention something that the DBE really needs to work on or fix when it comes to the appointment process for promotional positions. The respondents provided the following answers to one of these questions:

Respondent 1 mentioned that the department should emphasise the importance of having the right people for the job at all the schools, to ensure that quality education is offered in the entire district: “Since 2010, we never obtained anything less than 96% pass rate. And I think it’s because we are trying to get the right people in the posts”.

Respondent 2 emphasised the importance of following policy. The respondent argued that a lot of complications could be avoided if people simply stuck to what policy states. They add that people who apply for promotional positions should do so with the intention of contributing to the betterment of the school: “Promotional posts are a headache, né. If you apply for a promotional post, you must be willing to go the extra mile. You must be willing to have compassion for people, and so on. So, I told myself, anywhere at this school, I will never apply for a promotional post, because I know the people of this school. Maybe outside, one day. But I’m fine with what I have.”

Respondent 3 referred to themselves as someone who had been disadvantaged in the appointment process for a promotional position. The respondent mentioned how they have fallen short of promotion because of the influences of unions as well as the SGB. The respondent added that ultimately the department opted to appoint a person from outside to avoid conflict at the school: “We have two guys here, both son of the soils. They don’t know whom to appoint. Because, according to our judgement, if we give one of these two, there will be fights, or whatever., whatever you want to term it...If I have to put it like that, that’s also dangerous, if you say management positions, you get different levels of management.”

Respondent 4 was very hesitant to answer the last question. Eventually, the respondent very awkwardly or fearfully answered that they did not know of anyone who had been advantaged or disadvantaged in this regard.

Respondent 5 answered with certainty that they know a few people who had been advantaged and disadvantaged by the system and its related influences: “I can’t tell you off the cuff, but there are people who have been disadvantaged., And I’m taking it also from myself, like I explained my situation in the district offices. But don’t ever think that it is only because you’re a union member,

than you are against maybe another one who is not a union member. Even they themselves within the union, they themselves have got their own people. And also, there are many other people that I can tell you about. That have been really, seriously disadvantaged.”

Respondent 6 alluded to their experience where they had to resolve disputes that were lodged after the conclusion of an appointment processes: “We did have major disputes... where even myself... sometimes, you know as an HR manager, an HR manager position is a very critical position. But because now we deliberate, as the review panel, I’m part of the review panel, and we take it to the District Director. There are two cases, that myself, I’m still not comfortable. One it was in Area Z; one it was in Area B. I feel that unfairness prevailed on these two cases. Influences within the school!”

Respondent 7 indicated that they know of someone because they had represented the person in their capacity as a union representative: “Yes, I know. Because the person had shared their experience with me, and I was part as the union rep of the person. And we lost the case.”

Respondent 8 indicated that being affiliated to a union does not guarantee automatic employment for a promotional position: “I don’t believe in that, if I’m affiliated to a particular union, I’m going to get automatic employment. no there is no such thing. Because it depends on your credibility to express yourself at the interview. And then are you in that particular capacity?” The respondent also expressed their excitement for the fact that the SACE could possibly take the responsibility of overseeing the appointment process for promotional positions.

In terms of knowing of any influences in the appointment process, Respondent 8 stated the following: “Yes, I do... With this particular person, this one, he did qualify. But now he didn’t have what we call a connection...Connection being, in that particular school somebody else at that particular school, he is the SGB member, a teacher who is on the SGB; and then also, on one of the unions. Because of his connection...He did insist that this particular person must be shortlisted, and being again at the interview, be the one to be appointed... and then now, the one who is qualified didn’t get it, because of that particular connection. And then it did happen, these things do normally happens. I was at another school 2015, they popped up something like bribes, whereby somebody Was saying that somebody is being bribing like R15,000 or so to get that particular post.”

Respondent 9 indicated that they know of so many people who had been advantaged or disadvantaged in the appointment process. The respondent also mentioned how disappointed they felt by the fact that the department appointment them from the outside, to avoid conflict between two strong candidates that were the sons of the soil.

Another important issue that Respondent 9 pressed on, was the fact that whenever there were promotional vacancies at their school, unions would send representatives that were from the exact

same school where the appointment process is conducted: “When they send unions, that’s the one thing of interviews... when they send unions, let there not be a conflict of interests. Because now you will find it’s in my school né? And the I write a letter to the unions, inviting one to the shortlisting. Don’t send me one of my people here... It happens. Send me someone from another school. But okay, now they also interact, they are friends. But no conflict of interest must be evident. End ai is die problem because they know each other. Send someone neutral in terms of the interviews. That is one thing that I’ve observed. They will send someone, like now, a rep... like a rep in the school. For me, it’s already a conflict of interests, from the side of the union.”

Respondent 10 also indicated that they know people who had been advantaged by union influences in the appointment process: “Yes, yes! Joh, Joh!!! I do know, and they have been, I wouldn’t say in the past before there was a other unions, yes it happened and it happened a lot. Now for example here at our school we have very few who are in my union, and most ah in that other union, but they work together.”

Respondent 11 indicated that they were frustrated by the fact teacher unions that have a strong following in a school try to dictate how the school should be governed: “And the influence was coming from the union, because the union were the ones who were dictating. *Bona* [Setswana: look], let me tell you... I don’t want to lie to you. The unions would call the principal, want to dictate to the principal of what must happen. Even on issues of labour, you see, the principal is the CEO of the school. If the teacher misbehave, he’s got the right to take out a form and fill it in, and give a warning to the teacher. But after he has done that, the teacher union would call to say, ah no, you’re not supposed to. You suppose to have called us first.”

4.4. Conclusion

In Chapter Four, the researcher provided an analysis of the data, that served to contribute towards answering the research questions regarding the influence of teacher unions on the appointment process of promotional positions at public schools as presented in Chapter Three: Firstly, to decipher whether there are distinct centres of power within the management and governing forces in the appointment of teachers for promotional positions. Secondly, to provide an analysis on the link between micropolitics and school governance in terms of activism and school leadership. Thirdly, the researcher also determined whether the perceived merit system still advanced those principles of social justice and equity. Finally, to determine how teachers perceive the role of unions and related authority in the appointment process for promotional posts.

A total of 11 people were interviewed in the collection of the data, and their knowledge, experiences, and reactions were presented in this Chapter. The interviews that were conducted in the gathering of this data, helped the researcher understand the various factors that influence the

appointment process and ultimately affect the education system. The views expressed by all the participants provided a scintillating picture of how flawed and challenged the appointment process is. A comprehensive summary will be provided in the concluding chapter of this study.

Chapter 5: Findings, Recommendations and Conclusion

5.1. Introduction

The previous chapter focused on the data analysis of this study. Following the collection of data, the results were categorically arranged into five themes each consisting of related subthemes. These themes then elucidated the nature of the influence of unions on the appointments process of teachers for promotional positions.

The aim of Chapter Five is to provide an overview of the study (refer Section 5.2) by providing a synopsis of the foregone chapters. Based on the results from the related data analysis and the supporting literature, a discussion will be provided on the findings of the study (refer Section 5.3).

After discussing the findings of the study, and the implications thereof, a discussion with recommendations and propositions for further research will be provided (refer Section 5.4). The researcher will also provide a discussion on the limitations of the study (refer Section 5.5) and a reflection on this entire experience (refer Section 5.6). Lastly, the chapter will conclude with Section 5.7.

In this study, the researcher investigated the influence of teacher unions on the appointment process of promotional positions at public schools. The study was guided by the four following research questions:

1. Are there distinct centres of power within the management and governing forces in the appointment of teachers?
2. What is the link between (micro) politics and school governance with regard to activism and leadership?
3. Does a merit system advance social justice and equity?
4. How do teachers perceive the role of unions and authority in the appointment of promotional vacancies?

5.2. Overview of the study

5.2.1 Chapter One

In Chapter One, the focus was on setting the scene for this study wherein an overview of the influences on the appointment process for promotional positions was provided. Thereafter, the problem statement and the rationale for the research topic was discussed. The chapter also provided a discussion on the literature, which contextualised the influence of teacher unions on the appointment process for promotional positions, which provided the framework that guided this study. Lastly, the chapter introduced the research questions and aspects of the research design and methodology that was used for this study.

5.2.2 Chapter Two

Chapter Two contextualised the existing academic literature on the influence of teacher unions on the appointment process of promotional positions at public schools. To achieve the overall objective of the research questions guiding the study, the researcher discussed the critical importance of providing quality education in the new dispensation based on aspects of school governance. This analysis was within the international and national landscape. Secondly, the chapter examined the logic of providing a voice to teacher unions – within a set of policies and pieces of legislation – in terms of exercising and maintaining organisational control and conflicts over policy. Thereafter, the chapter examined the micropolitics of teacher unions in advancing the

interests of their members first and then that of the state through the ideology of social identity. The chapter was concluded by providing a synthesised summary of the interesting behaviour of teacher unions when they are pursuing organisational and personal interests. This review was provided against the state's obligation to provide quality education to all.

5.2.3 Chapter Three

The focus of Chapter Three was on the research design and methodology that was used in the study. Based on the qualitative research methodology the study followed an interpretivist paradigm, which inspires the process of data collection and analysis. Thereafter, a discussion on the validity, reliability and trustworthiness was provided. The chapter concluded with a discussion on the ethical considerations that applied to this study.

5.2.4 Chapter Four

In Chapter Four, the researcher provided an analysis of the data, which served to contribute towards answering the research questions that guided this study. The chapter included a detailed disposition of the themes that emerged from the data analysis. The chapter also aimed to: probe whether there are distinct centres of power within the management and governing forces in the appointment of teachers for promotional positions; provide an analysis on the link between micropolitics and school governance, from the perspective of activism and school leadership; determine whether the perceived merit system advanced principles of social justice and equity; and finally, determine how teachers perceive the role of unions and related authorities in the appointment process for promotional posts.

The insights that the respondents provided helped the researcher to understand the various factors that influence the appointment process for promotional positions. The views expressed by all the participants provided a coruscating analysis of how distorted the appointment process is.

5.3. Discussion on findings

The following discussion is based on the findings of this study and the comprehensiveness to which the research questions were addressed.

5.3.1 How do prominent centres of power within the management and governing forces in the appointment of teachers?

As indicated in Chapter One, the aim of this research study was based on figuring out who the authorities are in the appointment process. This question investigated the nature and/or value of authority that these entities had and their abilities to determine the outcomes of an appointment process.

5.3.1.1 Theme: The “string-pullers” and the “kingmakers” in the appointment process

In the data analysis, this emerging theme contributed to the research question as it provided narratives and/or sub-themes that probed the aspect of who the real decision-makers are in the appointment process. The researcher deciphered the dynamics of the stakeholders and their authority. The responses under this theme provided an idea of the extent of the influence that is exercised by the various stakeholders during the appointment process.

5.3.1.1.1 The efficiency and transparency of the appointment process

During the interviews for the data collection, respondents were asked how they perceived the concept of a promotional post and if they could explain the process thereof. As indicated in the revised PAM of 2016, as set out in the EEA (76 of 1998), respondents described the appointment process as one that includes: the advertising of a post, which is published in the Gazette and allows eligible people to apply for the position; the sifting process, which focuses on the disqualification of non-eligible applicants; the shortlisting process, which is conducted by the panel according to the specific criteria for the position; and the interview process which is the final stage before recommendations are made for the eventual appointment of a candidate by the District Director - as delegated by the HOD at the provincial level. Ultimately, respondents were able to validate the procedural aspects of the appointment process. However, when it came to aspects of transparency, a lot of information was presented dubiously.

The findings indicated that the criteria that panels use to shortlist candidates were sometimes manipulated to advance the interests of certain stakeholders. One of the aspects that stood out was the issue of determining the criteria that would advantage the son of the soil. Respondents indicated that panels would often determine a criterion that favours the candidate they have in mind. “Because what happens now is, now we must look at the needs; we must look at the additional criteria. So, what is happening now, we’ll create additional criteria to accommodate the

son of the soil.” The respondents mentioned that the SGB would include additional requirements to the standard criteria that do not necessarily reflect the needs of the school but do accommodate the son of the soil. This links with the words of Spoehr (2004:66) who mentioned that a candidate’s approval depends on the broader community. This undermines the value of efficiency in the appointment process and substantiates what Zengele (2013:17) mentioned about undue involvement, which contributes to a culture of incompetence in the education sector.

Another finding that contributed to the aspect of transparency (or the lack thereof) in the appointment process is that of union representatives who do not honour their roles as observers but would try to dictate proceedings. The respondents indicated that a union like the SADTU would use its industry dominance to intimidate and influence the appointment process and how schools are governed. In Chapter Two, Zengele (2013:18) alluded that the level of nepotism and intimidation in the filling of promotional posts have become so prevalent that it affects the motivation and the academic and professional quality of teachers at schools. Ultimately, the inconsistencies and the nature of how the stakeholders assert their authority compromises the transparency of the appointment process and the efficiency of addressing the educational needs at schools.

5.3.1.1.2 The role of teacher unions

The responses also provided clarity on the conceptual role of teacher unions in the appointment process for promotional positions. To confirm the role of unions, one had to compare the description of their role according to what policy states and whether the respondents perceived it in the same way. Generally, the respondents indicated that the teacher union representatives were mere observers during the appointment process. This observer status also means that the union representatives were there to ensure that the appointment process is conducted in a fair and consistent manner.

An aspect that indicated that there might be distinct centres of power in the appointment process came up when some of the respondents differentiated between passive and active observers. They argued that instead of quietly or passively observing the proceedings, union representatives should be allowed to interject and/or provide their inputs on certain matters as active observers. This links with Zengele (2013:47) who mentioned that unions use their expert power to act beyond their observer status during the appointment process, and it indicates that they are more knowledgeable on aspects of the legislation. One of the respondents even suggested that union representatives must be regarded as party agents as it is in politics. These party agents can actively play a role in the proceedings.

Perhaps the idea of party agents is not the best solution. This could open doors to active lobbying that might compromise the process. However, the idea of active observers might not be such a bad proposal considering how long the appointment process can take. So, instead of lodging a dispute that could be reviewed at the end of the process, union representatives can be given a limited platform to contribute and rectify those instances that complicate the appointment process. The researcher echoes the sentiments of the respondents who alluded to the aspect of SGB members and the resource person that sometimes display ignorance on certain policy matters. Thus, union representatives could be allowed to step in with their policy-based knowledge.

5.3.1.1.3 Distinct centres of power within school governance and the appointment process and related activism

By conclusively determining whether there are distinct centres of power within the management and governing forces in the appointment of teachers, respondents were asked how they perceived the distribution of authority among the various stakeholders. Some of the respondents indicated that the distribution of authority among stakeholders is fine when everyone knows and understands their respective roles. However, the findings also indicated that when people do not understand their role, they start encroaching onto the duties of others. This overstepping of boundaries is what often causes conflicts.

One of the other determinants that were mentioned, was the dynamics of the relationship between the SGB and the principal. It was suggested that the socio-economic context of a school and its community determines the working relationship of the SGB and the principal. The findings suggested that in typical quantile 1 schools, the principal often dictates matter because of their educational superiority. Considering his/her position, and the probability of being more erudite than the SGB, the principal would use this as an advantage to push a specific objective.

Respondents also alluded to the fact that the principal would use the SGB as an instrument in advancing their interests in return for money or related incentives. They mentioned how this collaboration would allow people to misuse their power. Respondent 2 cited an instance where the principal gave SGB members R2 000 per month if they signed off or backed him on matters that needed approval from the SMT.

A similar example was cited by Respondent 3 although they mentioned how one's prosperity lies in knowing people in higher positions. The respondent indicated how a candidate would pay a departmental official R2 000 per month for a certain period if the official ensured that the candidate gets the position. This speaks directly to the Volmink report and its discoveries about the 'jobs-for-cash' scandal.

Another finding that indicated a distinctive centre of power was on the aspect of belonging to a strong union. The respondent suggested that if you belong to a strong union that can influence a process, your chances of getting a position was better. A respondent cited that if you were a member of the SADTU, you are politically inclined to its associative organisation – i.e., the ANC – which allows you to benefit from it in many aspects such as appointments.

The departmental official who was interviewed indicated that the distribution of authority in the appointment process was fair and that the department has measures in place for when they suspect foul play. The official cited the fact that the SGB of a school would be removed before the end of their term if they were found to be influencing the appointment process or other related acts of misconduct. The official's response on the aspect of centres of power indicated a great deal of naivety. This approach can be perceived as diplomacy or pure ignorance to the fact that, on the ground level, there are many irregularities that compromise the process. In the MTT report, the DBE (2016) declared that the combination of weak authorities, aggressive unions, compliant principalship and teachers eager to benefit from union membership and advancement has been a major contributor to the education sector's irregularities that contradict any values of professionalism.

The last important note that stood out in the findings was the aspect of the SGB members who lack the proper educational background. Respondents argued against the fact that despite their ignorance, SGB members had a larger representation on the panel that scored candidates during the interviewing process and the fact that the SGB could make recommendations on who gets appointed. The respondents believe that the lack of experience and knowledge on educational matters leaves room for poor decision-making and manipulation during the appointment process.

Ultimately, when determining whether there are distinct centres of power within the management and governing forces in the appointment of teachers, it can be concluded that there are indeed distinct centres of power. The following findings stood out in terms of the stakeholders and their power and/or authority in the appointment process: The principal with his/her educational background and their positional authority; departmental officials who get paid for manipulating the process; strong union representation that can manipulate the process for the sake of territorial dominance; and the SGB's susceptibility to manipulation due to their member's lack of educational acumen on educational policies and school governance matters.

5.3.2 What is the link between micropolitics and school governance, with regards to activism and leadership?

Stimmel (2010:09) referred to micropolitics as the political dynamics that apply to decision-making processes and the allocation of resources at schools. He added that micropolitics conceptualises

the use of power and the conduct of decision-makers in a process. The nature of leadership is often determined by a person's affiliation. Thus, the focus of this question is to determine the link between affiliation and school governance. This means that the question rationalises the phenomenon of activism and the value of leadership. The question also covers those aspects of professional callousness and power play by those with strong (union) affiliations when it comes to the appointment process.

5.3.2.1 Theme: The social identity of role-players in the appointment of promotional positions.

The emerging theme contributed to the study as it provided narratives/sub-themes that helped the researcher understand the principles of reciprocal collaboration and/or support between teacher unions and other educational stakeholders – especially in terms of the mutually beneficial aspects.

5.3.2.1.1 The dynamics of SGB involvement.

The first emerging sub-theme that contributed towards answering the research question focuses on the dynamics of SGB involvement in the appointment process. In this regard, the participants were asked what their thoughts are on the proposed draft Basic Education Laws Amendment Bill. Most of the respondents fully supported the proposal to have the SGB's authority – to make recommendations in the appointment process – removed or limited.

The respondents strongly argued that SGB members should not make decisions on the appointment for promotional positions. Some of the respondents alluded to the low economic standards in communities that were largely due to the level of illiteracy and/or the lack of proper education. Respondents added that some SGB members barely finished school or do not have the educational acumen to make those kinds of executive decisions. Thus, how can these parents be entrusted with the responsibility of deciding who gets appointed for crucial promotional positions at schools?

The findings also indicated that SGB members are not objective in their involvement and/or decision-making. According to the respondents, SGB members have predetermined motives and they advance their interests and appoint people who they "like". Four respondents shared how they had previously been on the receiving end of SGB members' – who were hell-bent on settling personal scores – actions by being vindictive and by ensuring that they never received a further promotion or completely sabotaged their ability to carry out their duties. Once again, depending on the context of the school, SGB members were susceptible to manipulation due to the various contextual factors.

An interesting finding was that the departmental official who was interviewed had no knowledge of the draft proposal. The respondent mentioned that they had no clue of policy changes regarding the appointment of teachers. Despite the release of the MTT report by the Department of Basic Education, the respondent maintained that SGB members are the appointers at schools. The respondent added the fact that the department could dissolve the appointing panel at the school if they become aware of any ethical discrepancies in the appointment process.

Two of the respondents expressed their complete discontent with the proposed draft Bill. The respondents argued that this proposal undermines the value of democratic governance and indicated the department's stance on capacitating parents in poorer communities. The respondents alluded to the fact that the department is captured by unions and that the motive behind this draft policy is political. They mentioned that the department and this specific union were merely eliminating possible stumbling blocks that would otherwise have prevented them from flexing their influence on the education sector and completely disregarding the voice of the parent component in schools.

5.3.2.1.2 The inimical role of teacher unions during the appointment process.

The second sub-theme that emerged in the findings displayed the true nature of union involvement in the appointment process. The findings indicated that unions often fail to maintain and/or fulfil their observer status in the appointment process. The respondents mentioned that the union representatives refuse to be passive observers and would provide their inputs if they felt that the panel lacked knowledge on policy matters despite the availability of a resource person.

The findings also indicate the risk of affording unions this kind of platform. The respondents mentioned that the unions tend to overstep their boundaries and would try to dictate proceedings. The rest of the respondents, however, maintained that teacher unions do fulfil their role as observers during the appointment process. They cited the importance of having an assertive principal and a resource person who can guide proceedings and address any uncertainties during the appointment process.

5.3.2.1.3 The importance of belonging to the “right” union.

This sub-theme is linked with the aspect of having distinct centres of power in the appointment process. In this regard, the findings prevalently indicated the importance of belonging to the “right” teacher union. Respondents were asked if there was any benefit in being affiliated with a specific union when applying for a promotional position.

The first thing that stood out in the responses, was that two of the respondents alluded to the aspect of proportional representation. The respondents mentioned that the SADTU has the most members and perhaps that could be the reason why so many of their members occupy promotional positions at schools. In fairness to these respondents, that argument is valid. According to Volmink *et al.* (2016:83), as indicated in the MTT report, the membership numbers of the SADTU and development opportunities justify the reason why a lot of their members occupy key positions at schools. However, there are strong traces of cadre deployment in that regard.

The findings also indicated that there is a large degree of lobbying and cadre deployment. The respondents mentioned the fact that union members are promised key positions at schools and within the department because of their contributions to the unions. Findings also indicated that people who occupy management positions within the SADTU branches were appointed as school principals or departmental officials. One of the respondents also mentioned how these promised positions led to internal conflicts within the union.

Furthermore, the respondents also indicated that a person's chances of getting appointed into a promotional position were higher if they are members of the SADTU. The respondents indicated that you had to be a popular figure or an active member to get strong advocacy from those who represent you in the appointment process and that your reputation as a member would precede you. Lastly, it was also mentioned how unions with strong representation at schools had a habit of imposing themselves; providing a platform for unions to try to dictate how the school is governed.

5.3.2.1.4 The role of social identities.

Having established the nature of being affiliated with a strong union and the politics thereof, the researcher also investigated the role of community membership – or being the son of the soil. The responses indicate that in some instances, being the son of the oil is advantageous in one's application for a promotional position. The respondents indicated the strong advocacy teachers locally received from SGB members.

Respondents mentioned how SGB members often felt strongly about appointing their "children", and the level of prestige and honour that was attributed to those decisions. However, findings also indicated that candidates are aware of this advantage, and they would lobby for community members to advance a certain narrative. One of the respondents alluded to how SGB members could determine the governance of the school based on the benefits they could enjoy in return.

The findings also indicated how candidates will lobby for SGB members to make decisions in their favour in exchange for tenders or other financial incentives once they received the position. One of

the respondents also explained how important it is to have influential connections and to have those community members on your side.

5.3.2.1.5 The influence of appointing the maverick.

Considering the dynamics of social identities and the micropolitics that determine the governance of schools, the researcher also probed the aspect of appointing an outsider. The findings indicated that an outsider is rarely preferred and/or welcomed by those in the school.

One of the respondents cited the fact that community members protested and closed the school for more than two weeks as they were against the appointment of this respondent as the principal. It was also discovered that one of the other applicants for that position – someone who happened to be the son of the soil – was responsible for lobbying community members and inciting the demonstrations.

Whenever there are micropolitical conflicts between the stakeholders in the appointment process, it is because of the conflicting interests between unions and the SGB. Ultimately, the findings indicate that being known as a comrade seems to yield more benefits for those who apply for promotional positions.

5.3.3 How does a merit system advance social justice and equity?

This research question was aimed to determine whether appointments in the promotional positions are based on merit. Considering the importance of promoting the principles of social justice and equity, the researcher determined the extent to which merit was compromised for the sake of social justice and equity and the role that teacher unions play in this context.

5.3.3.1 Theme: Equality is not always justice

This emerging theme contributed to answering the research question as it aimed to determine the nature of policies and practices that promote meritorious standards in the appointment process. The answers provided in this section indicate the dynamics of upholding policy and prioritising the needs of the school by making suitable appointments.

5.3.3.1.1 Virtuous policies and the merits thereof.

This sub-theme was aimed at acknowledging the importance of promoting principles of social justice and equity. In this regard, policies that speak to aspects of social justice and equity in the appointment process were discussed in the literature chapter. The LRA 66 of 1995, for instance, which speaks of the importance of advancing economic development, social justice, labour peace and the democratisation of workplaces; and the Employment Equity Act 55 of 1998, which serves to ensure that the implementations of employment equity redress the effects of discrimination, and to achieve a broadly represented workforce. During the data collection process, the researcher aimed to determine what role teacher unions and the rest of the stakeholders in the appointment process play in promoting these principles.

The findings indicated that respondents knew these principles needed to be upheld in the appointment process for promotional positions. The respondents mentioned that in some instances, schools will apply these principles to ensure that they balance the dynamics of the gender of the SMT. However, respondents indicated that the appointment process is compromised when these policies and/or principles are used as an instrument to appoint incompetent people.

The respondents strongly argued that a panel should always have the prerogative to prioritise the needs of the school before meeting equity targets. One respondent mentioned that there must be a very good reason for the appointment of someone merely for the sake of equity. Another respondent cited that some policies are used to promote exclusivity that contributes to the son of the soil narrative and disregards the quality of the candidate. They mentioned that sometimes a post will be advertised in a way that exclusively benefits people from the North-West province and that your chances as someone from another province were slim.

A very interesting finding was that the North-West Department of Education does not have a formal policy on equity. According to the departmental official, equity in the North-West province has been a huge problem as there is no clear policy that provides guidelines on equity standards. The respondent indicated that the department was trying its best to balance equity by “taking the best candidate”. This statement can be interpreted in many ways.

5.3.3.1.2 Democratic governance and its contribution to quality education.

This sub-theme emerged when the researcher inquired on the implications of implementing the proposed Basic Education Laws Amendment (BELA) draft Bill. Considering the importance of democratic governance as described in the SASA, respondents were asked to what extent they

thought this draft policy would influence the appointment of promotional posts and the quality of education at schools.

The responses suggested that this policy can benefit the education system. Respondents mentioned that there will be more accuracy in the appointment process – in terms of competency. As indicated in the MTT report, the respondents maintained the fact that SGB members cannot have a say in the appointment of individuals who are more qualified than they are. The respondents argued that SGB members lack the capacity to make executive decisions and that the implications of appointing the wrong person for a promotional position can eventually affect the quality of education offered at the school.

Another finding indicated that draft policy was a progressive step for the education sector as it places the responsibility of key employment opportunities in the hands of the employer. The respondents argued that policy already makes provision for the District Director to override the recommendations made by the SGB; the draft policy will simply formalise that function.

Furthermore, respondents also cited, once again, the political motives of this proposed policy. One of the respondents indicated that the department could be using this policy as a tool to reduce the authority and exclusiveness of SGB's at former Model C schools. The respondent cited the fact that the department is constantly challenged in court cases by SGB's who dispute the appointment of candidates that they never preferentially recommended.

The other argument, however, was that the department is using this policy as a tool to advance agendas and to reinforce the stronghold that teacher unions have on the education sector. They mentioned that the department should rather draft strategies that aim to empower SGBs, instead of strategically side-lining the only statutory body that keeps teacher unions at bay.

5.3.3.1.3 Collegial contributions during the appointment process.

As indicated in Chapter Four, this emerging theme focused on the notions that SGB members may not have the required knowledge on aspects of a specific policy and that perhaps unions, as educational stakeholders, and active observers, could be consulted on the latest policy matters that the SGB and other panel members were uncertain of or seeking clarity on.

The findings indicate the panel should always consult their resources person during the appointment process. However, one of the respondents indicated that it often happens that the resources person misinterprets or does not understand policies. Hence, the possibility of union representatives being consulted increases.

Respondents also indicated that the reputational dominance of the SADTU and their affiliation with the ANC play a big role in the proceedings of appointment processes. They mentioned how these

union representatives will manipulate and/or intimidate the principal who is overseeing the appointment process and dictating the course of events in the background. One of the respondents mentioned that unions have the kind of connections that give them enough information about a post that they lobby and/or groom people in advance for that position.

5.3.4 How do teachers perceive the role of unions and authority in the appointment of promotional vacancies?

This question focused on those aspects of policy and practice, which determine how teachers perceive the role of unions and authority in the appointment process for promotional vacancies. Here, the researcher evaluated the role of teacher unions and their behaviour in their pursuit and/or advancement of organisational and personal interests.

5.3.4.1 Theme: The disjuncture between policy and practice

This emerging theme contributed to answering the research question as it examined the perspicacity of teacher unions and the true nature of their authority and influence on the appointment process. The sub-themes also rationalise the logic of providing a voice to teacher unions within a set of policies in terms of exercising and maintaining organisational control and conflicts over policy.

5.3.4.1.1 The importance of policy interpretation and application.

During the data collection, respondents were asked whether they thought there is a disjuncture between the interpretation of policies and how they are applied. What was interesting was how naively or diplomatically the departmental official stated that there was no disjuncture between policy and practice. The respondent stated that the policies in the appointment process are clear and that all the schools stick to those prescribed guidelines.

The other respondents, however, argued that there is a major disjuncture between policy and practice. The respondents cited that the disconnect occurs because people intentionally bend the rules, and not necessarily because of a lack of knowledge. One of the respondents mentioned the need for consistency and efficiency in the training that SGB members required.

Furthermore, the findings suggested that the lack of workshops, especially for SGB members, contributes to their lack of capacity. The respondents indicated that the same consultation process that the department had with teacher unions should be held with SGB members and the rest of the

school community. The respondents also indicate that policies are interpreted differently because of how they are communicated to the various stakeholders. Hence, the disapproval of the BELA draft Bill.

The responses also cited that the gap in knowledge of the SGB members and other stakeholders is often exploited by teacher unions. They mentioned that unions are part of the consultation process when policies are drawn up and that they conduct thorough workshops with their members. Therefore, it's obvious that unions will have an advantage in the appointment process, yet they are expected to be mere observers. Ultimately, the ignorance of the other stakeholders affects the confidence with which they do their work.

As previously indicated, the departmental official indicated that the North-West province does not have a clear policy on equity. The respondent mentioned how challenging this was for the department and that they try to appoint the best candidate. This kind of uncertainty creates room for a lot of discrepancies and opportunities for people to advance their interests. Some of the respondents mentioned that the disconnect between policy and practice and subsequent conflicts occur because of vague guidelines and the uncertainty of role-players regarding their duties.

One of the respondents argued that SGB members are often challenged by the SMT and union site-stewards when it comes to governance matters. The respondent acknowledged that the SGB may lack knowledge on certain aspects; however, the respondent contended that they should not be undermined as they are not completely clueless.

5.3.4.1.2 The link between micropolitics and policy disjuncture.

This sub-theme probed the extent to which the disconnect between policy and practice is influenced by micropolitical conflicts and matters of affiliation. One of the respondents brought up the point that these conflicts occur because of principals who do not respect the governance structure of the school. As previously mentioned, school principals use their level of education as a tool to undermine SGBs and to dictate how the school should be governed. The respondent mentioned that the principal will disregard their inputs – citing that they are illiterate and that they should trust his decision-making because he knows what is best for the school.

Findings also showed that governance is about resources. Most of the micropolitics is attributed to the allocation of resources and the related power struggles. Respondents indicated that school principals manipulated the SGB election process to ensure that people who can carry out a mandate is elected. One of the respondents mentioned principals will lobby people to run for the SGB by promising to award them tenders that could be mutually beneficial. They added that greed would often determine how long this kind of relationship survived.

Another finding indicated that union affiliation and related micropolitics also play a role in the appointment process and the governance of schools. The respondent mentioned that because most of the teachers at the school are SADTU members, the principal, the SMT and the SGB experience a lot of problems. They mentioned the fact that these teachers believe that they are untouchable. One of the respondents who are an SGB member at a school also mentioned that they would receive calls from the union branch instructing them to act against the misconduct of their members.

5.3.5 Conclusions

Considering the outcomes of this study, in terms of the literature that was explored and the data that was collected, the following conclusions can be made regarding the research questions:

5.3.5.1 How do prominent centres of power within the management and governing forces in the appointment of teachers?

The findings in this study indicate that there are indeed distinct centres of power within the management and governing forces in the appointment process. The researcher found that considering the context of the school, each of the stakeholders exercised a degree of “string-pulling” in the appointment process.

In terms of teacher unions, it was established how powerful they are and how far their influence can stretch. The findings indicate how unions like the SADTU have a stronghold on schools through their members who occupy key positions and those within the district offices. The researcher refers to the respondents who indicated that a fee of R2 000 per month, for a certain period, would ensure that you get the position you are applying for. The researcher also recalls a respondent who mentioned how an individual was declared as the principal of a school before it was even built.

Ultimately, the researcher’s findings are validated in the MTT report, which suggests that the irregularities in the appointment process are due to weaknesses within districts (DBE, 2016:17-18). This translates to the fact that where authority is inept and sluggish, teacher unions – by their undue influence over matters, which primarily should be the responsibility of the department – step in and become a prominent centre of power.

5.3.5.2 What is the link between micropolitics and school governance, with regards to activism and leadership?

The study determined that there is a link between micropolitics and school governance. The researcher approached this question from a social identity perspective, to determine the role thereof in the appointment process. The findings can be interpreted from the context of appointing the son of the soil; or from the context of cadre deployment.

Although the respondents indicated that the son of the soil theory was promoted within unions, the findings indicated that in most cases this phenomenon was advanced by the SGB. The researcher discovered that in most instances, the SGB would strongly advocate for a local person to be appointed into a promotional position. The respondents also indicated how there are often conflicting interests between the SGB and the unions. Ultimately, the BELA draft Bill proposes the omission of the SGB from the appointment process for promotional posts because of corruption and undue influences in the decision-making of this governance structure.

The other perspective of micropolitics is from the context of cadre deployment. The findings of this study indicated how cadre deployment and the related benefits of being affiliated with unions influence the appointment process. As much as the researcher acknowledges the aspect of proportional representations when it comes to the SADTU, one cannot be oblivious to the inherent prosperity that comes with being affiliated with this union. Ultimately, as substantiated in the MTT report, the dominance of unions like the SADTU not only influences the governance of schools but it also contributes to the irregularities in the appointment process.

5.3.5.3 How does a merit system advance social justice and equity?

Considering the findings in this study, the researcher concludes that merit does not always advance social justice and/or equity. The findings indicated that the North-West Department of Education does not have a formal equity plan. This means that schools are given the autonomy to manage those dynamics by themselves. The researcher also concludes that schools are not willing to compromise the needs of the school for the sake of policy. Respondents mentioned how they complied with policy but would not use it as an excuse to appoint incompetent people. According to one of the respondents, as a principal, he would not appoint a female, for example, for the sake of equity when the male candidate had better credentials.

Most respondents indicated that appointments should be based on merit. However, the findings indicated that the aspect of merit is a variable determinant that depends on the context of the school. The researcher also found that these uncertainties regarding policies are the reason why unions changed from observers to superintendents. The findings indicated that unions'

representatives will interfere in the appointment process because they understand and know how to interpret policies better than the other members on the panel. These interjections put undue pressure on panels, and it contributes to the narrative of SGBs who cannot make executive decisions regarding the appointment process.

5.3.5.4 How do teachers perceive the role of unions and authority in the appointment of promotional vacancies?

The findings in this study indicated that the behaviour of unions and/or those in authoritative positions suggests that they will act beyond their duty as observers in the appointment process to advance their organisational and/or personal interests. Respondents indicated that the influence of unions starts before the post is advertised as they lobby and start mobilising people for a particular position. The findings also indicated the prevalence of resourceful connections, such as bribery and related incentives, manipulation, patronage, and partisanship.

Ultimately, the perception of teachers about the role of unions and authority is determined by the dynamics of affiliation. Linking with the social identity theory the respondents indicated that the achievement of your ambitions as a teacher is depended on the union that you are affiliated with. Notwithstanding the aspect of proportional representation, the industry dominance of a union and one's affiliation to that union ascribes to beneficial career prospects.

At the end of the day, if the DBE wants to maintain control over the education sector, policies will have to be reviewed to allow unions to play a limited active role in the appointment process. This means that the DBE should find a way to provide a voice to unions within a set of policies and to maintain better organisational control.

5.4. Recommendations and possibilities for further research

Based on the findings of this study regarding the influence of teacher unions on the appointment process for promotional positions at public schools, the following recommendations are made:

5.4.1 Clear guidelines on administrative process and related policies.

In terms of administrative policies in the appointment process, more attention should be given to guidelines on the selection of panel members for the appointment process for promotional posts at the school. Circuit managers and/or the HR manager need to play a more active role in the selection and approval of panel members before the appointment process starts. During the data collection, the departmental official mentioned that the circuit manager assists the school principal

and/or the SGB in the composition of the panel for the appointment process: “The circuit manager are responsible for monitoring the schools. So, together... It depends also on the level of the post. He will assist the school management to come with the panel, as to who will be the panel members.” This aspect is not formally indicated in the EEA (76 of 1998). Chapter B(5.4)(5.4.2.1) of the EEA only proclaims that one departmental representative (who may be the principal), serves as an observer and a resources person.

The findings indicated that there are discrepancies in terms of who gets selected to serve on the panel. Some of the respondents cited that the principal would select people that could advance his/her interests in the appointment process. Other respondents cited that sometimes the union representatives that were sent to observe an appointment process were from the same school where the process is conducted.

The findings also indicated that there is no formal policy on employment equity in the North-West Department of Education. This creates a huge loophole in recruitment strategies at schools. The lack of standardised recruitment strategies creates a platform for many disputes by those who do not agree with the outcome of an appointment process. Thus, the researcher suggests that clear policy guidelines be developed in terms of the appointment process and its related factors to minimise conflicts over the outcome of appointment processes.

Lastly, the department should also put policies in place to curb the emergence of unprofessional officials. The findings suggested that there were dubious activities by people who hold key positions at the department and within union branches. More strategies need to be put in place to expose these corrupt officials that feed the narrative that one needs connections or be affiliated with a particular union to get appointed.

5.4.2 Structured pliability in the role of teacher unions during the appointment process.

The findings indicated that the role of teacher unions in the appointment process is that of mere observers. However, many respondents alluded to the fact that union representatives disregard this observer role and play an active part in the process. The respondents used the term “active observers”. They mentioned that the rigid policies and the incapacity of panel members provided an opportunity for unions to bend the rules by interfering.

The researcher recommends that that appointment policies be adapted, and that the role of union representatives be upgraded to a limited active role. The relevant stakeholders should come up with a strategy that will allow union representatives to provide their constructive inputs. Considering those factors that might jeopardise the appointment process, principals and/or the designated

resources person and the rest of the panel need to prepare well to ensure assertive and accurate management of the appointment process.

5.4.3 Proper development of SGB members.

The researcher is of the opinion that the BELA draft Bill is a digressive step in our education system. The proposed solution to limit or remove the SGB's power to make recommendations contradicts the objectives of democratic governance and community participation. This omission also fails to justify how SGBs – who lack the capacity, as cited in the MTT report – can be entrusted with school finances yet they cannot make decisions on who gets appointed in promotional positions. Another argument is that the report alludes to the inequities of both the SGB and the unions, yet decisive changes only apply to SGB members. The report provides strategies to ratify and or rehabilitate the behaviour of unions but allows them to remain part of the appointment process, yet the voice of the SGB is taken away.

Better strategies need to be put in place to train and develop SGB members who are part of the appointment process. More emphasis needs to be put on the role of each stakeholder in the appointment process to ensure that everyone is competent and prepared to carry out their duties in that regard. The value of community participation by SGB members should not be undermined. After all, SGB members provide an alternative perspective of governance and in most cases, they seek to make decisions that are in the best interests of their learners. As indicated by one of the respondents, school principals should take the responsibility of holding workshops with their SGB members, the SMT and other stakeholders on the appointment process to discuss the recruitment policies of the school. The district departments should also actively play a role in the development of the SGB and other community members. This will gain the trust of community members and allow them to be more accepting of departmental initiatives.

5.4.4 Assigning an independent legal officer.

As the regulatory body in the teaching profession, SACE needs to play a bigger role in the appointment process for promotional positions. The findings in this study indicated that SACE is only involved and/or mentioned in the appointment of post level 1 positions. In this regard, the role of SACE is to certify if a teacher is registered and meets the requirements to be appointed as a departmentally paid teacher at a school. However, the MTT report cited the involvement of SACE

in the jobs-for-cash scandal. The report indicated that SACE had close links with teacher unions, which compromises its status as an independent regulatory body.

Thus, considering the discrepancies of SACE, the researcher recommends that an independent legal officer be assigned by district departments. This legal officer should be responsible for overseeing the appointment process. This person could serve as an observer in the appointment process, which could minimise complaints regarding the processes.

5.5. Limitations of the study

The nature of this study presented the inevitability of limitations. The researcher alludes to the following aspects that served as limitations in this study

5.5.1 Exposing corrupt dealings

The first limitation is based on the controversial nature of the topic. Following the exposé that was done by *City Press* on the “jobs-for-cash” scandal and the mentioning of people being killed for promotional positions meant that the researcher is treading un semi-uncharted grounds. This meant that the researcher had to be careful in how he selected the samples for this study. One had to be mindful of the reasoning that was used to justify the selection of a school.

Another aspect of exploring such sensitive information was the fact that some respondents were not very keen to participate in this study. Respondents feared that their identities might be exposed as some of them occupy key positions at the schools, within the unions, at the department and even in political structures. This meant that participants were not always comfortable with disclosing the kind of information that could jeopardise their careers. One should also mention that some of the respondents were not really at ease when they participated in the interviews. The interviews took place at the school where the participant works, meaning the chances that the interview could have been disrupted were high, or that someone could have listened in on the conversations.

5.5.2 Limited academic information

The speculative nature of the study meant that there was a limited amount of relevant academic content to work from. One also had to be careful of being subjective in this study. Despite the findings, the researcher had to broaden his perspective to ensure that the findings were not pre-determined.

Very few scientific studies have been conducted on the topic of union interferences and aspects of cadre deployment. Most information in this regard is from news articles. This study was inspired by the 2009 “jobs-for-cash” events in KZN and fortunately, since then a significant amount of information has been made available to ensure the successful exploration of the topic.

5.5.3 Covid-19

It goes without saying how Covid-19 presented limitations in this research study. In the first place, the researcher found it very difficult to conduct interviews at schools as there were strict measures in place in terms of the accessibility of schools. The fluctuating lockdown regulations and the infection rate determined when schools opened. One of the schools where the researcher had scheduled interviews was closed for two weeks as numerous people there had been in contact with infected individuals.

Considering the amount of teaching time that was lost because of the school closures, it was very difficult to schedule appointments with the respondents. School principals were reluctant to allow the researcher to conduct interviews as the teachers were already under pressure to ensure that catch-up programs ran smoothly. Some of the respondents also cited how they felt tired and overworked because of the adjusted teaching programs. Some of them had previously been infected with Covid-19; therefore, they were hesitant to have face-to-face meetings.

5.5.4 Other limitations

The researcher cannot disregard the aspect of bias in this study. The researcher acknowledges the subjective and/or speculative nature of the data that was collected. Some of the participants spoke from an emotional point of view and were evidently against the status quo at their places of employment.

More limitations to this study included the financial constraints of having to liaise with the respondents as the researcher had to drive to the various schools. Sometimes, the researcher had to drive to a school twice as the appointments were scheduled to the convenience of the participants. At one stage, the researcher drove to a school and had the appointment cancelled upon arriving on the school premises.

The last notable limitation was from a more personal perspective. Conducting this study while being temporarily employed presented its challenges. The demands of work often made it difficult to fully concentrate on this study. At times, the researcher neglected the study for up to two weeks while concentrating on other duties.

Ultimately, the researcher is grateful that these limitations could be overcome, and that the data were collected successfully.

5.6. Self-reflection on the study

The journey of conducting this study has played an important role in supplementing my knowledge of the public school system. Some of the challenges I experienced related to principals at some schools who failed to deliver on their promises to communicate with their SMT's about my interests to conduct research. The complications of rescheduling appointments and following up on the confirmed ones with the hope that nothing has changed should also be mentioned.

During the research process, I got to understand many aspects of the education system from a school-based perspective. Despite the information that I read, the insights that the respondents provided elucidated a different world that inspires one to immediately start with the next research project. Although I had to work hard to ensure that participants do not go off track during the interviews, the information that was shared contributed significantly to this study.

5.7. Conclusion

Chapter Five concludes the research study, which investigated the influence of teacher unions on the appointment process of promotional positions at public schools. The chapter provided an overview of the study by briefly discussing the preceding chapters. Thereafter a discussion on the findings of the study followed. After discussing the findings of the study and the implications thereof, a discussion with recommendations and propositions for further research was provided. The researcher also provided a discussion on the limitations of the study and a reflection of this entire experience.

Ultimately, this research study indicated the need for education reform on aspects of school management and leadership. A collaborative approach needs to be adopted to contribute to development and advancements to ensure the provision of quality education.

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Addendum A – Ethics certificate



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ETHICS APPROVAL LETTER OF STUDY

Based on approval by the Faculty of Education Research Ethics Committee (EduREC) on 29 April 2021, this committee hereby approves your study as indicated below. This implies that the North-West University Senate Committee for Research Ethics (NWU-SCRE) grants its permission that, provided the special conditions specified below are met and pending any other authorisation that may be necessary, the study may be initiated, using the ethics number below.

Study title: The influence of teacher unions on the appointment process of promotional positions at public schools																														
Study Leader/Supervisor (Principal Investigator)/Researcher: Prof J Heystek																														
Student / Team: ME Matos (MEd student – 25133837)																														
Ethics number:	<table border="1"><tr><td>N</td><td>W</td><td>U</td><td>-</td><td>0</td><td>1</td><td>2</td><td>8</td><td>1</td><td>-</td><td>2</td><td>0</td><td>-</td><td>A</td><td>2</td></tr><tr><td colspan="3">Institution</td><td colspan="3">Study Number</td><td colspan="3">Year</td><td colspan="3">Status</td></tr></table>			N	W	U	-	0	1	2	8	1	-	2	0	-	A	2	Institution			Study Number			Year			Status		
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Status: S = Submission; R = Re-Submission; P = Provisional Authorisation; A = Authorisation																														
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Low risk																														
Expiry date: 29 April 2022																														
Approval of the study is initially provided for a year, after which continuation of the study is dependent on receipt and review of the annual (or as otherwise stipulated) monitoring report and the concomitant issuing of a letter of continuation.																														

Special in process conditions of the research for approval (if applicable):

General conditions: While this ethics approval is subject to all declarations, undertakings and agreements incorporated and signed in the application form, the following general terms and conditions will apply: • The study leader/supervisor/principal investigator/researcher must report in the prescribed format to the EduREC: – annually (or as otherwise requested) on the monitoring of the study, whereby a letter of continuation will be provided, and upon completion of the study; and – without any delay in case of any adverse event or incident (or any matter that interrupts sound ethical principles) during the course of the study. • The approval applies strictly to the proposal as stipulated in the application form. Should any amendments to the proposal be deemed necessary during the course of the study, the study leader/researcher must apply for approval of these amendments at the EduREC, prior to implementation. Should there be any deviations from the study proposal without the necessary approval of such amendments, the ethics approval is immediately and automatically forfeited. • Annually a number of studies may be randomly selected for an external audit. • The date of approval indicates the first date that the study may be started. • In the interest of ethical responsibility, the NWU-SCRE and EduREC reserves the right to: – request access to any information or data at any time during the course or after completion of the study;
--

- *to ask further questions, seek additional information, require further modification or monitor the conduct of your research or the informed consent process;*
- *withdraw or postpone approval if:*
 - *any unethical principles or practices of the study are revealed or suspected;*
 - *it becomes apparent that any relevant information was withheld from the EduREC or that information has been false or misrepresented;*
 - *submission of the annual (or otherwise stipulated) monitoring report, the required amendments, or reporting of adverse events or incidents was not done in a timely manner and accurately; and / or*
 - *new institutional rules, national legislation or international conventions deem it necessary.*

The EduREC would like to remain at your service as scientist and researcher, and wishes you well with your study. Please do not hesitate to contact the EduREC or the NWU-SCRE for any further enquiries or requests for assistance.

Yours sincerely



Prof JAK Olivier
Chairperson NWU Faculty of Education Research Ethics Committee

Original details: (22351930) C:\Users\22351930\Desktop\ETHICS APPROVAL LETTER OF STUDY.docm
8 November 2018

Current details: (22351930) M:\DSS18533\Monitoring and Reporting Cluster\Ethics\Certificates\Templates\Research Ethics Approval Letters\9.1.5.4.1 ES-REC Ethical Approval Letter.docm
5 December 2018

File reference: 9.1.5.4.2

Addendum B – Example of letter of permission requesting to conduct interviews with participants

School Principal

XXXXX Secondary School

Subject: Request to conduct research-based interview.

Dear Ms., XXXX

This letter serves as a formal request to conduct research for my M.Ed. degree in Management and Leadership, at your school. The details regarding the research study, as approved by the NWU Faculty of Education Research Ethics Committee (EduREC), are as follows:

Full title of the research project/thesis/dissertation:

The influence of teacher unions on the appointment process of promotional positions at public schools.

Brief overview of the study:

This study focuses on the interferences that have riddled the appointment process of teachers into promotional vacancies (post level 2 and upwards) at public schools. This study aims to investigate issues of quality education, in the backdrop of the ideology of merit systems that serves to achieve social justice, which is disguised as a sense of cadre in the quest of advancing social and economic equity. The researcher deciphers the impact of conscious activism and leadership that cites a strong connection between politics and school governance. Furthermore, one investigates the perspicacity of teachers towards trade unions, in determining the actual role of teacher unions in the appointment process. Considering the latter, the researcher probes whether there are prominent centres of power within the education sector, that ultimately contribute to the disjuncture between policy and practice, and the subsequent dysfunctionality in the governance of public schools in South Africa.

The target group for the study:

An official from the district department of basic educations. An individual who is involved in the appointment process of teachers at schools.

A selection of 3 (Three) schools has been made, where individual interviews will be conducted with staff members of the following interest groups:

- the school principal;
- An teacher who is part of the academic **School Management Team (SMT)** - and has participated in interviews for promotional positions (Subject HOD, or Deputy principal);
- An teacher who is part of the SGB - and has participated in interviews for promotional positions.
- A union representative and/or member that is not part of the SMT yet participated in the interview process
- A member of the SGB – preferably the chairperson

A total of 4-5 individuals will be interviewed. Participation in these interviews is on a completely voluntary basis. The anonymity of participants will be guaranteed throughout the entire study.

Envisaged date for conducting the interviews (day/month/year):

02 - 10 August 2021

Envisaged date of submission of the research report and research summary (Month/Year):

15 September 2021

Value of the research to the National Department of Basic Education as well as the XXXX District:

The conceptualization of academic development stands as an archetype for insightful experiences narrated through a deep analysis of institutional paradoxes, ambiguities, and incongruity, that is vividly illuminated through the outcomes of influential forces of power. One identifies the importance of quality education as a major concern, and by means of this research project, the researcher is inspired to decipher the possible factors that play a role in ensuring the provisioning of quality education at public schools. The researcher also acknowledges the principles on which teacher recruitment policies are based, although the successful implementation thereof is riddled by influential (interfering) factors of teacher unions. As such, the researcher aims to investigate the behaviour of teacher unions that seem to be paradoxical to the objectives of national education policies. In collaboration with the XXXX District Department of Basic Education, this research project serves to find solutions as to how the educational needs of schools, with regard to school governance, can be addressed without compromising the credibility and the integrity of appointment processes in the public education sector.

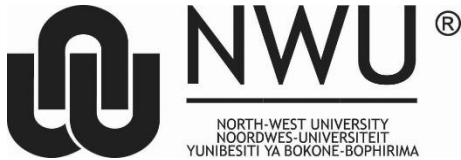
Considering the provided information, I would appreciate it if you would kindly consider my request to conduct research in this regard. Official supporting documents as approved by the District Director and the NWU Faculty of Education Research Ethics Committee (EduREC) are available upon request.

I look forward to hearing from you.

Sincerely.

Mário Matos

Addendum C – Example of informed letter of consent of research



Ms. XXXX
HR Manager
NW Department of Education District official

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Faculty of Education

EDULEAD

Tel: 084 XXX
Email: XXX

Date: 2021-08-06

PARTICIPANT INFORMATION AND CONSENT FORM

I hereby request your consent to participate in this research, which focuses on the influence of teacher unions on the appointment process of promotional positions at public schools. Prior to granting permission, kindly acquaint yourself with the information below.

The details of the research are as follows:

TITLE OF THE RESEARCH PROJECT:

The influence of teacher unions on the appointment process of promotional positions at public schools

ETHICS APPLICATION NUMBER

NWU-

PROJECT SUPERVISOR: Prof. Jan Heystek

CO-SUPERVISOR: N/A

ADDRESS: Building C6, R 258 North-West university Potchefstroom Campus 2530

CONTACT NUMBER:

MEMBER OF PROJECT TEAM MEd-Student: Mário Matos

ADDRESS:, Potchefstroom, 2531.

CONTACT NUMBER: 084 XXXX

FACULTY OF EDUCATION RESEARCH ETHICS COMMITTEE

Contact person: Ms Erna Greyling, E-mail XXXX@nwu.ac.za, Tel. 018 XXXX

This study has been approved by the Research Ethics Committee of the Faculty of Education of the North-West University and will be conducted according to the ethical guidelines of this committee. Permission was also asked from the provincial Department of Basic Education, as well as the school principal and chairperson of the School Governing Body.

What is this research about?

The aims of this research are:

- Determining the critical importance of providing quality education in the new dispensation based on aspects of school governance.
- Examining the logic of providing a voice to teacher unions within a set of policies and pieces of legislation in terms of exercising and maintaining organizational control and conflicts over policy.
- Examining the micro-politics of teacher unions in advancing the interest of their members first, then that of the State through the ideology of Social identity.
- Providing a synthesis summary of the interesting behaviour of teacher unions when they are pursuing organisational and personal interest.

Participants

A selection of 3 (Three) schools will be made, where individual interviews will be conducted with staff members of the following interest groups:

- the school principal;
- An teacher who is part of the academic School Management Team (SMT) as well as SGB and participated in interviews (Subject HOD, or Deputy principal;
- A union representative and/or member that is not part of the SMT, yet participated in the interview process
- A member of the SGB – preferably the chairperson
- A member of the district-review panel (this is an official departmental structure charged with the responsibility of adjudicating on the disputes lodged by aggrieved parties or candidates)
- A circuit-manger or area-managers in charge of the administration of the circuit or district;

What is expected of you as participant?

Participants are expected to take part in individual interviewing sessions where they are required to answer a few questions regarding the role and/or influence of teacher unions in the appointment process of promotional positions, as honestly as possible.

Benefits to you as participant

There are no direct benefits for participants. Participants merely contribute towards the further understanding of influencing that occurs during the appointment process of promotional positions at public schools, by teacher unions

Risks involved for participants

There are no foreseeable risks for participants during the interviewing process. One considers the aspect of time constraints for the interview process, as well as the physical well-being of the participants during this process. Emphasis will be placed on the fact that participants are free to withdraw from the research project at any time and will not suffer any negative consequences as a result hereof. No remuneration is offered for participation in this study.

Confidentiality and protection of identity

The researcher undertakes to treat the information that is acquired during the interview process as confidential and not to disclose the identity of any participants or schools participating in the research. All reports and the use of collected data will be dealt with in such a way that maintains the anonymity of participants.

Dissemination of findings

The findings of the research study will be recorded in the researcher's MEd dissertation. Should there be a need for feedback or updates, the findings of the research study will be disseminated to all participants in the form of a short summary

If you have any further questions or enquiries regarding your participation in this research, please contact the researchers for more information.

Yours sincerely
Mário Matos
(Researcher)

DECLARATION BY PARTICIPANT:

By signing below, I agree to take part in a research study entitled:

Role conflict and ambiguity in mid-level management in primary schools

I declare that:

- I have read this information and consent form and understand what is expected of me in the research.
- I have had a chance to ask questions to the researcher and all my questions have been adequately answered.
- I understand that taking part in this study is voluntary and I have not been pressurised to take part.
- I may choose to leave the study at any time and will not be penalised or prejudiced in any way.
- I may be asked to leave the research process before it has finished, if the researcher feels it is in my best interests, or if I do not follow the research procedures, as agreed to.

Signed at (place) _____ on (date) ____/____/20____

Signature of participant

Researcher

Addendum D – Interview schedules

Title of study: The influence of teacher unions on the appointment process of promotional positions at public schools.

Purpose and instruction:

The independent person recruiting you and requesting this interview, will have mentioned the fact that I'm currently busy with a research project for the MEd dissertation. The research study focuses on the influence of teacher unions on the appointment process of promotional positions at public schools. Thank you for agreeing to take part in this interview for providing formal consent in this regard.

I would like to reiterate that this interview serves to obtain your opinions regarding the influence of teacher unions on the appointment process of promotional positions at public schools, and any related matters. The information obtained will be used for research purposes as approved by the NWU scientific committee.

In this regard, the anonymity of participants takes precedents. This means that the identities of participants, schools, or any other educational stakeholders involved in this study, will be kept confidential, and will not be made known in the report.

The research questions of this study serve as a framework for deciphering aspects related to the research topic. As such, the interview questions are aimed at providing clarity on the following research questions:

- How do prominent **centres of power** within the management and governing forces in the appointment of teacher?
- What is the **link between politics and school governance**, with regards to activism and leadership?
- How does a **merit system** advance social justice and equity?
- How do teachers **perceive the role of unions and authority** in the appointment of promotional vacancies?

Do you have any questions before we start the interview?

May I make a voice recording of the interview using my cellular phone?

This would help me in the transcription process of the interview, for data-analysing purposes, as it allows me to listen to the interview again at a later stage.

Your interview questions must focus on the following:

Questions for principal, teachers, union representative and SGB members:

Kindly answer the following questions as honestly as possible:

1. Kindly provide a brief background of yourself and the position you occupy.
 - What does your position entail?
 - How long have you been in this position?
 - Can you briefly explain the process you went through in applying and being appointed for this position?
2. With regards to the appointment process of teachers in the filling of promotional posts:
 - How would you describe a promotional position at school level?
 - How do promotional positions contribute to the quality of education in the school?
 - ✓ Can you give an example?

- Explain the appointment process for a promotional vacancy?
- Who is involved in the appointment process? Would you explain the role of each stakeholder?
 - ✓ What role does the SGB play?
 - ✓ At which stage/phase of the process do teacher unions get involved?

3. During the shortlisting process:

- Who is responsible for the shortlisting of candidates?
- What are the general criteria for the shortlisting of a candidate?
- What happens when everyone doesn't agree on the shortlisted candidates? Please explain?

4. During the interview process:

- Who serves on the interview panel?
- According to your understanding, how are these individual selected?
- Do you think it's a fair process? Why do you say that?

5. With regards to the SGB:

Recent proposals on the department's draft Basic Education Laws Amendment Bill, suggests that the SGB's authority to appoint and/ or to make recommendations for teachers into promotional positions will be limited.

- What's your take on this matter?
- To what extent would it influence the appointment of promotional post s and the quality of education of the school? Why do you say so?

6. With regards to the union representative: (during the interview with the union representative the words in brackets will be used)

- (What is your role as teacher union representative) What is the role of a teacher union during the appointment process of promotional positions?
- (Do you as union representative) Does union representative fulfil their (your) role as observes? Please explain.
- During the interview process, were (you) they at any point allowed to provide inputs, or take part in the interview process?
 - ✓ Were they allowed to advocate for their members?
 - ✓ Were they consulted on policy matters?
 - ✓ Did they give inputs on the shortlisted candidates?

7. In terms of legislation:

- What can be done to ensure good implementation of the appointment policy at schools.
- Do you think there's a disjuncture between policy and practice?
 - ✓ Please explain.
 - ✓ Can you give an example?

- How would you approach it?
- In the backdrop of social justice and equity, how do you perceive merit?
- In your opinion, what role do (you as) union representatives play in promoting social justice and merit?

8. In terms of school governance:

- There's this notion that micro-politics and school governance are linked to each other... How do you perceive micro-politics?
 - ✓ What do you think causes these micro-politics/differences?
 - ✓
- During the appointment process, how would you describe the distribution of authority, among the involved stakeholders?
 - ✓ How would you describe the different kinds of authority?
 - ✓ Where does this authority come from?
 - ✓ Has anyone misused their authority during the appointment process?
 - ✓ Why / why not?
- What role do unions play in this regard?
 - ✓ Is there any benefit in being affiliated with a union in this regard?
 - ✓ Why / why not?
- Does political affiliation and or acumen count for anything?
- Does a candidate's social identity matter?
 - ✓ Why do you say so?

9. Would you say community membership is an advantage in the appointment process?

- ✓ Is being a son of the soil worth anything in the appointment process? Does it count in your favour to be a (known) resident of the community? Please explain.
- ✓ What if the candidate is an "outsider" (or an applicant outside the school)?

10. Do you know of someone who's been advantaged/disadvantaged by the current process?

- ✓ Why / why not?

Questions for DBE officials:

Kindly answer the following questions as honestly as possible:

1. Kindly provide a brief background of yourself and the position you occupy.

- What does your position entail?
- How long have you been in this position?
- Can you briefly explain the process you went through in applying and being appointed for this position?

2. With regards to the appointment process of teachers in the filling of promotional posts:

- How would you describe a promotional position at the school level?

- How do promotional positions contribute to the quality of education in the school?
 - ✓ Can you give an example?
- 3. How would you explain the appointment process for a promotional vacancy at schools?
 - Who is involved in the appointment process? Would you explain the role of each stakeholder?
 - ✓ What role does the SGB play?
 - ✓ At which stage/phase of the process do teacher unions get involved / come into play?
- 4. During the shortlisting process:
 - Who is responsible for the shortlisting of candidates?
 - What are the general criteria for the shortlisting of a candidate?
 - ✓ Does the department provide guidelines with regards to the criteria?
- 5. During the interview process:
 - Who serves on the interview panel?
 - How are these individual selected?
 - Do you think it's a fair process? Why do you say that?

6. With regards to the SGB:

Recent proposals on the department's draft Basic Education Laws Amendment Bill, suggests that the SGB's authority to appoint principals and teachers into promotional positions will be limited.

- What's your take on this matter?
 - Should this Bill be passed, how do you think it would affect the appointment process?
 - To what extent would it influence the governance of the school? Why do you say so?
7. With regards to the union representative:
- What is the role of a teacher union during the appointment process of promotional positions?
 - Does union representative fulfil their role as observes? Please explain.
 - During the interview process, are they at any point allowed to provide inputs, or take part in the interview process?
 - ✓ Are they allowed to advocate for their members?
 - ✓ May they be consulted on policy matters?
 - ✓ Can they give inputs on the shortlisted candidates?
8. In terms of legislation:
- What can be done to ensure good implementation of the appointment policy at schools.
 - Do you think there's a disjuncture between policy and practice?
 - ✓ Please explain.

- ✓ Can you give an example?
- How would you suggest that schools approach policy implementations?
- In the backdrop of social justice and equity, how do you perceive merit?
- In your opinion, what role do union representatives play in promoting social justice and merit?

9. In terms of school governance:

- There's this notion that micro-politics and school governance are linked to each other... How do you perceive micro-politics?
 - ✓ What do you think causes these micro-politics/differences?
- During the appointment process, how would you describe the distribution of authority, among the involved stakeholders?
 - ✓ How would you describe the different kinds of authority?
 - ✓ Where does this authority come from?
 - ✓ Has anyone misused their authority during the appointment process?
 - ✓ Why / why not?
- What role do unions play in this regard?
 - ✓ Is there any benefit in being affiliated with a union in this regard?
 - ✓ Why / why not?
- Does political affiliation and or acumen count for anything? Does a candidate's social identity matter?
 - ✓ Why do you say so?

10. Would you say community membership is advantages in the appointment process?

- ✓ Is being a son of the soil worth anything in the appointment process? Does it count in your favour to be a (known) resident of the community? Please explain.
- ✓ What if the candidate is an "outsider" (or an applicant outside the school)?
- What happens if the school community rejects the final appointment of a candidate, as decided by the departmental HOD?
 - ✓ Does policy effectively mitigate the situation? Explain.
 - ✓ What role would the union play in this regard?

11. Has there been instances where candidates were advantaged/disadvantaged by the current process?

- Please elaborate

Addendum E – North-West Department of Education Circular: Department circular no. 58 of 2020



education

Lefapha la Thuto la Bokone Bophirima
Noord-Wes Departement van Onderwys
North West Department of Education
NORTH WEST PROVINCE

Taletso Building,
Dr Albert Luthuli Drive, Mmabatho
Private Bag X2044, Mmabatho 2735
Tel.: (018) 388-3602
Fax: (018) 388-1701
e-mail: omotang@nwpg.gov.za

CHIEF DIRECTORATE: HUMAN RESOURCE MANAGEMENT AND DEVELOPMENT

General Enquiry: OM Motang 018 388 3602

Enquiries : HR Districts Offices
Tel : As indicated in the Circular
Ref : Circular 58 of 2020

Date : 27 November 2020
To : Deputy Director Generals
Chief Directors
District Directors
Deputy District HR Managers
Sub District Managers
Circuit Managers
Principals of Schools
Educators
School Governing Bodies
Employee Organisations

DEPARTMENTAL CIRCULAR NO. 58 of 2020

The Department hereby publishes a list of vacancies of Principals, Deputy Principals and Departmental Heads on the establishment of the North West Department of Education.

1. OBJECTIVES

- 1.1 To ensure that filling of posts is completed within the minimum time-frame possible and is perceived as objective, just and acceptable; and
- 1.2 To elicit the commitment of all parties to ensure the meaningful and democratic participation of relevant stakeholders.

2. PRINCIPLES

- 2.1 The processes, procedures and mechanism used should facilitate objectivity and the entire process must constitute fair labour practice;
- 2.2 The process must be congruent with agreements reached in the ELRC with specific reference to collective agreement 5 of 1998.
- 2.3 Any person who is an applicant for a post as advertised in the vacancy list must not participate in the short-listing, interview process or any other aspect with regard to the filling of the posts;
- 2.4 The filling of these posts must as far as practically possible accommodate educators declared in excess matching the profile of the advertised post.
- 2.5 The filling of these posts must further be guided by:

2.5 The filling of these posts must further be guided by:

2.5.1 Affirmative action measures for designated groups, (namely Blacks which include Africans, Coloured and Indians), women and disabled persons.

2.5.2 Representivity in line with the demographics

2.5.3 Chapter 3 of Employment of Educators Act 76 of 1998 will be observed when making appointments

2.5.4 North West Department of Education and Sport Development reserve the right not to make appointment and may withdraw a post/s advertised in this circular

3. SIFTING

3.1 The District Office shall handle the initial sifting process to eliminate applications of those candidates who do not comply with the requirements of the post(s) as stated in the advertisement;

3.2 All applicants that meet the minimum requirements as advertised must be handed over to the School Governing Body (SGB) responsible for the specific school;

3.3 Those applicants which do not meet the minimum requirements as advertised should also be forwarded to the School Governing Body (SGB) ; and

3.4 Employee Organisations which are parties to the Council will be given a report on candidates who meet the minimum requirements for the post/s in terms of the advertisement and candidates who do not meet requirements and other relevant information that is reasonably incidental thereto.

3.5 Applicants who do not receive a correspondence from the department two months after the closing date should consider their applications unsuccessful.

4. MINIMUM REQUIREMENTS FOR APPOINTMENT

4.1 QUALIFICATIONS

4.1.1 Grade 12 (Standard 10) certificate is compulsory and must be included in the application form

4.1.2 All applicants must have at least a recognised three-year qualification (REQV 13) which must include appropriate training as an educator.

4.2 EXPERIENCE

4.2.1 Candidates applying for the different [post levels (post level 2 to 4) are required to satisfy the following minimum years of experience.

Post level	Minimum years of experience
2	3 years
3	5 years
4	7 years

4.2.2 Actual teaching experience as well as other appropriate experience will be

considered only if it is traceable and can be accounted for.

5. REGISTRATION

- 5.1 Registration with the South African Council of Educators (SACE) is compulsory and certified copy of an applicant's SACE registration certificate must accompany his or her application.
- 5.2 Where the applicant is not in possession of certified copy of applicant's SACE certificate, any other proof obtained from SACE/employer that the applicant has registered is acceptable.

6. GENERAL PRINCIPLES/ CRITERIA FOR SHORT LISTING OF APPLICANTS

- 6.1 Short-listing must be manageable and should not consist of fewer than 3 candidates and should not exceeds five candidates per post
- 6.2 The School Governing Body must establish the Short-listing Committee to short-list applicants for interviews; if not possible a District official (Sub-District manager) should assist the SGB;
- 6.3 The Short-listing Committee must formulate additional criteria for short-listing and the relevant employee organisations who are recognised members of the ELRC must observe the process;
- 6.4 **A list of appropriately weighted indicators should be arrived at using information provided in the advertisement (as well as duties, skills and qualities that are relevant to the post as a basis).**
- 6.5 Data contained in the application submitted (the curriculum vitae and prescribed forms as per advertisement) should serve as the source of information for each applicant;
- 6.6 A detailed schedule of all applicants is prepared as per each advertised posts.
- 6.7 Relevant employee organisations must be granted the opportunity to observe this process to satisfy themselves that the above-mentioned criteria were applied properly, provided that should any such employee organisation be unable to utilise this opportunity, such inability shall not negatively affect this process. They must be given at least five working days' notice in this regard; and
- 6.8 **The Interview Committee must conduct short listing subject to the following guidelines;**
- 6.8.1 The criteria used must be fair, non-discriminatory and in keeping with the constitution of the country;
- 6.8.2 The curricular needs of the school; and
- 6.8.3 The subject or post requirements
- 6.8.4 All candidates who have been short-listed must be called for an interview.

7. INTERVIEWS

- 7.1 The SGB must establish an Interviewing Committee which must include a departmental representative as a resource person whose role will be to advise

them on Departmental policies.

- 7.2 The resource person must share the equity status with the panel before the interview may proceed.
- 7.3 The panel must be made of at least three members (two experts and a person who may not be an expert but experienced, have appropriate knowledge and /or expertise and / or involvement in the domain covered by the post). Any deviation from the norm must be thoroughly motivated and approved by the Head of Department or delegate.
- 7.4 Other members of the committee should, excluding educator members who are applicants to the advertised post/s, one union representative per union that is a party to the provincial chamber of the ELRC.
- 7.5 The union representatives shall be observers to the process of interviews and the drawing up of a preference list.
- 7.6 Each interview Committee shall appoint from amongst its members a chairperson and a secretary;
- 7.7 The school Governing Body must receive, consider and ratify the recommendation of the interview committee
- 7.8 Each short-listed candidate must be given seven (7) working days' notification of the time, date and venue of the interview (unless a shorter period is mutually agreed upon);
- 7.9 Questions must be set in the morning of the interview and must respect the 60: 40(*60% actual work knowledge and 40% policies, circulars and legislation*) rule of the composition of questions.
- 7.10 Candidates must be contacted on the basis of information supplied in their applications. Various modes of communication are acceptable (in writing, by fax, phone, telegram, personal contact, etc). The School Governing Body must keep proper records (per candidate) of the modes of communication utilised. Every reasonable attempt must be made to contact candidates;
- 7.11 All interviewees must receive the same treatment during interviews.
- 7.12 The School Governing Body is responsible for the convening of the interview Committee and they must ensure that all relevant persons/ organisations are informed at least five working days prior to the date, time and venue of the short-listing, interviews and the drawing up of the preference list. The non-attendance of duly notified employee organisations as observers should not retard the process;
- 7.13 The interview should be structured to address salient indicators attached to the post under consideration;
- 7.14 The interviewing panel must rank the candidates in order of their preference, giving a brief motivation for their choice. During this process the relevant employee organisation can send observers to sit in.

- 7.15 Signatures must be attached on the relevant forms after the final decision on the ranking of candidates have been made;
- 7.16 The SGB must ensure that accurate records/ comprehensive minutes are kept of proceedings dealing with the interviewing of candidates short-listed, as well as decisions relating to the nomination of suitable candidates. These records must be stored by the School Governing Body for reference purpose for a period of three years;
- 7.17 A distinction should be drawn between educators in their capacity as members of the SGB and teachers in their capacity as representatives of the employee organisation.
- 7.18 The interviewing committee at the institution should remain unaltered until all interviews are completed;
- 7.19 Each and every committee member and observer should append his/her signature on the score sheet;
- 7.20 Changing the interviewing committee may render the process unlawful
- 7.21 The resource person must ensure that the committee is not altered at all costs should that happen, then the interview must be stopped immediately.

8. GENERAL INFORMATION

- 8.1 The School Governing Body must inform the relevant district manager of any problems with regard to the arrangements for acceptable short-listing and /or interviewing mechanisms
- 8.2 Successful candidates should only assume duty in their new posts after their appointments have been approved and they have received a formal letter of appointment issued by the Department.
- 8.3 The SGB should not inform the successful candidate of its recommendation before the appointment has been approved by the Department.
- 8.4 The School Governing Body must notify the unsuccessful shortlisted candidates after the incumbent has assumed duty.
- 8.5 The following documentation must be sent to the Division: HR Administration at the respective District Office not later than **18 December 2020** for processing:
 - 8.5.1 The list of applicants (schedule hereby per post) with the final selection in order of preference for appointment, duly completed and signed by interviewing panel, Chairperson of the Institution's Governing Body, the Area manager, the Review Panel , the District Manager;
 - 8.5.2 The complete application form and curriculum vitae of the recommended candidate; and
 - 8.5.3 The interview schedules (indicators determined by the School Governing Body)

with a brief motivation of their choice.

- 8.6 School Principal/Circuit Manager must ensure that their staff and School Governing Body are fully informed about the advertisements and all steps necessary for the filling of the vacant posts.
- 8.7 All the advertisements are subject to amendment by the Department.
- 8.8 *The Department therefore reserves the right to issue offers of appointment in terms of the valid grading of the school as applicable on the offer date and the applicant may accept or decline the offer.*
- 8.9 Furthermore, if a post has been advertised and the learning institution does not qualify for such a post according to the post establishment for 2020, the Department will regard the post as cancelled.
- 8.10 The Department in consultation with the School Governing Body may withdraw the advertised post as the result of Rationalisation of schools as well as for the purpose of ELRC Collective Agreement 4 of 2016 and 1 of 2014 (PELRC).
- 8.11 An applicant who applied for more than one post and the offer letters are issued simultaneously would be granted the opportunity to choose the preferred post by the appointing Authority where practically possible.
- 8.12 The choice made by the applicant referred to above will be final and such an Opportunity and or failure to make a choice must not delay the recruitment process.

9. PROCEDURE FOR APPLYING

- 9.1 A separate application form (EDNW 2), must be completed, signed and submitted for each application for a post. **The relevant EDNW 2 form is attached to the vacancy list and is the only acceptable form.**
- 9.2 Applications without a completed EDNW 2 will not be considered.
- 9.3 Curriculum Vitae must be submitted with each application form.
- 9.4 **Certified copies of the following documentation are compulsory and must be submitted with each application:**
- 9.4.1 Matriculation Certificate
 - 9.4.2 Professional Qualification (Diploma, Degree, etc),
 - 9.4.3 A copy of the identity document
 - 9.4.4 SACE Certificate
10. **Incomplete applications which are not accompanied by all the required documents or sent to the wrong address or reaching their destinations after the closing date will not be considered.**
11. The envelope containing the applications must be marked "Application for an advertised post" and forwarded to the District Manager of the respective district for the attention of the appropriate official as listed below:
-

DISTRICT	RESPONSIBLE OFFICIAL	POSTAL ADDRESS AND PHYSICAL ADDRESS	TELEPHONE NUMBER
Bojanala	Dr D More	Private Bag X82 110, Rustenburg, 0300 Palladium House Rustenburg	(014)597 1025 Cell: 082 200 3865
Ngaka Modiri Molema District	Mr SS Ramong	Private Bag X 10, Mahikeng, 2745 No 10 Nelson Mandela Drive, Mafikeng	(018)388 3013 Cell: 082 475 2637
Dr Kenneth Kaunda	Mr B. Masooa	Private Bag XI 256, Potchefstroom, 2520 8 Greyling Street Potchefstroom	(018)299 8296 Cell: 071 687 2121
Dr Ruth Segomotsi Mompoti	Mr DS Ntlabathi	Private Bag X21, Vryburg, 8600 17 Van Niekerk Street Vryburg	(053) 928 7500 Cell: 082 882 5158

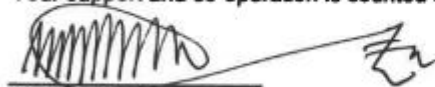
12. DOCUMENTATION ATTACHED

12.1 Vacancy List

12.2 Application Form (EDNW)

13. Closing date: 11 December 2020

Your support and co-operation is counted upon


JNT Mohlala
Administrator Sec 100(1)(b)

27/11/2020
Date



BE SAFE
STAY AT HOME

WASH YOUR
HANDS OFTEN

WEAR A MASK WHEN
GOING OUTSIDE

MAINTAIN SOCIAL
DISTANCING



Addendum F – Language editor declaration

WESSEL KRUGER	Editor and Proofreader Research consultant PhD Art et Scien.
Mooidraai Winburg PO Box 145 9420	CONTACT ☎ 083 3788 394 ✉ Wessel Kruger ✉ wessel@sipc.co.za

TO WHOM IT MAY CONCERN

Herewith I, Wessel Johannes Kruger, declare that I am a qualified, certified language practitioner and that I have edited the following article for language and writing errors:

The influence of teacher unions on the appointment process of promotional positions at public schools

for: Mr Mário Matos

All changes and suggestions were indicated via track changes (in MS Word) for the author to verify. I take no responsibility in the instance of authors disregarding such changes and suggestions, for plagiarised copy or for factually incorrect statements. The document remains the final responsibility of the author.

Best regards,



Wessel Kruger,
11/23/2021 /

Addendum G – Turnitin Report

M_Matos_Dissertation_for_Turnitin_20_Nov_2021....

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