

# **CONSEQUENCES OF STAFF DEPLOYMENT IN PUBLIC PRIMARY SCHOOLS IN CAPE TOWN**

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I selected some of the data from a table in Maile (2005) to calculate and illustrate the percentage of teachers in excess who could not be redeployed for various reasons.

Province	Number or educators declared in excess	Possible number of educators who cannot be redeployed	Percentage of educators who cannot be redeployed
Eastern Cape	10289	666	6.5%
Northern Cape	214	39	18.2%
Western Cape	2038	805	39.5%
Gauteng	3885	0	0%
Free State	1377	0	0%
Mpumalanga	896	33	3.7%
North-West	5589	2418	43.3%
KwaZulu-Natal	7338	0	0%
Limpopo	4623	unknown	

**Table 2: Statistical calculation of percentage of teachers who could not be redeployed as at 30 September 2000**

The Western Cape was one of the provinces where just over 2000 teachers were declared in excess in this period. At the end of the process in September 2000, it had the second highest number of teachers (39.5%) who could not be redeployed. Only the North West Province had more, with 43.3% of its teachers in excess that could not be redeployed. This is a clear indication of the extent of the problems experienced as a result of redeployment in the province.

Soudien (2001:34) says that in the early stages of the redeployment process,

staff identified as being in excess was given the option of applying for a severance package or of being redeployed elsewhere in the country. In terms of this 5923 teachers applied for and were given severance packages in the Western Cape Province in 1996. 1200 applied to be and were redeployed to more poverty stricken areas.



As Maile (2005) points out, if the number of teachers in the system at the time who had accepted the Voluntary Severance Package (5923) is considered as a percentage of the number of posts created in the Western Cape (25 629), one arrives at an answer of 23%.

$$\frac{\text{VSP}}{\text{Posts created}} \times \frac{100}{1}$$

$$\frac{5923}{25629} \times \frac{100}{1}$$

23.10%

A large portion of expertise was thus lost to the public education system. A number of these teachers were absorbed into posts created by School Governing Bodies but the majority of them decided to leave the system.

Soudien's (2001) study focuses on the impact of the restructuring process for schools in the previous House of Representatives (Coloured) group. Maile (2005) had a different focus. This study looked at the redeployment issue from the perspective of the redeployed educator. This is an angle that I take in my study. Maile's focus was more on the procedural fairness of the process and the redeployed teachers' feelings towards their previous schools' principal and staff. However, he also deals incidentally with the issue of how the process affected the individual. My study hones in on this particular aspect of the redeployment process, in other words how it affects the individual on a personal and professional level.

"A target date of 2005 was set for the completion of the reform process" (Soudien 2001:22). Whilst the large scale redeployment of the late 1990s and early twenty first century has to a certain extent come to an end, it is important to note that "as a process, redeployment is ongoing and continuous" (Maile 2005:177). The mass exodus and redeployment of educators has come to a virtual stop, but it is now done on a much smaller, yet significant, scale. The fact remains that even on this

small scale, redeployment still has negative implications for the teachers identified and the schools involved.

## 2.7 The effects of being declared in excess on staff

When you ask someone who they are, they will, apart from saying their name, inevitably bring up what type of work they do during the course of the conversation. We perceive ourselves through the job that we do. I am ... a teacher / a lawyer / a plumber, etc. The job that we do is linked to our identity. Job loss or a mere threat to our sense of job security will have an effect on how we perceive ourselves. Other than our names, our jobs are often the next important thing that defines us. When choice is taken out of the equation and teachers are told to move against their will, it will have a greater negative impact.

Let us focus on identity for a brief moment. As Wenger (1998:145) so eloquently puts it, “focusing on identity, however, is not a change of topic but rather a shift of focus within the same general topic”. Identity shifts the focus to who we are in relation to the group. We do not exist as beings in isolation, but we are involved in a daily interaction with other people who at the end of the day shape us into the beings that we are. Moore (2005:175-176) puts it this way:

[N]o one should have any doubt that a person's identity is a critical definer of legal status and that the question of identity is ubiquitous, that it exists everywhere in the social environment, and that the identity issue is not only a matter of the roles of individuals, but of the categorization of groups.

This creates a sense of belonging is shaped through our interactions with other people who act as a mirror in which we can get a glimpse of who we are.

Allow me to use an example to illustrate this point. I know that I have studied for a number of years to become a teacher and have the certificates stored in a drawer somewhere. This gives me the necessary documents to prove to others that I am a teacher. However, these documents only come into play when I need to prove to others, perhaps a prospective employer, that I am a qualified teacher. However, it is my daily interactions with other teachers and my daily actions as a teacher that give me the sense of belonging to the global community of teachers. These interactions

with others who ply the same trade give me a sense of belonging, and therefore help to shape my professional identity.

[W]e do not have a single fixed identity. Rather, at different times and in different places, various aspects of our identities may be foregrounded depending on with whom we are interacting. In this sense, each person's identity is actually a hybrid of multiple dimensions of a self. Gomez and White (2010)

If this sense of identity and belonging, or the job security that it holds, is being threatened like in the case of rightsizing, it can lead to feelings of “loss, anxiety, anger, insecurity, mistrust and stress”. (Maile 2005:173)

Organisational change is unavoidable, especially in a country like South Africa which is trying to compete in the global society. Change is necessary to stay relevant in an ever-changing world. It is when change threatens people's sense of identity that it takes on a negative dimension. Global society is undergoing constant changes and countries reposition themselves on an ongoing basis to remain relevant in this ever-changing world. “Organisational change may be seen as a ‘normal’ consequence of survival and development in a rapidly changing world. In many situations this change can involve organisational downsizing” (Hyman, Watson and Munro: 2002). As Maurier and Nothcott as quoted by Hyman et al (2002) point out:

[S]everal studies have pointed to a direct link between job uncertainty and negative health effects. Other than this a person's self-esteem, self-worth and personal economic conditions may be affected. Job losses with long serving staff resembled that of bereavement with feelings of anticipatory grief; acute mourning; refusal to accept.

The American Institute on Stress reports on their website that there are many contributing factors to stress in the workplace. Some of these causes include:

[working] long hours, feeling that you are being treated unfairly, not having any acknowledgement or reward for a job well done, and most importantly, increased demands but having little control or decision making latitude of your work activities. A lack of job security is also cited as one of the major causes of stress in the workplace and has been a growing problem due to more downsizing, hostile takeovers and mergers. (American Institute of Stress 2008)

Oliver et al. (2003:186) ranks teaching as one of the more stressful occupations. He explains that people who form part of the helping professions (which includes teachers), are particularly prone to stress because of their idealistic goals. Such stress can cause “job compassion fatigue” ... (which) involves a subtle but progressive erosion of behaviour, attitude, health and spirit that eventually inhibits an individual’s ability to function effectively at work. It involves emotional exhaustion, depression and diminished personal accomplishment accompanied by frustration and strain. (Oliver et al., 2003: 187). An American study found that threatened job loss is accompanied by a number of traditional stages, involving disbelief, sense of betrayal, confusion, anger and ultimately, resolution. This is very similar to the stages of bereavement that an individual will go through when losing a loved one through death.

Whilst change can be good for streamlining operational requirements, the process, which may include downsizing and the redistribution of resources (both human and physical), can be very “clinical in terms of a ‘rational’ calculation of the benefits and cost to the organisation as a whole” (Hyman et al., 2002: 184). In terms of the rationalisation and redistribution of teachers, one can understand why the teacher can be seen as just a number or a name on a piece of paper that is dealt with in a very clinical manner. I think that principals are in a way forced to deal with the matter of rightsizing in such a clinical manner because they are constantly reminded about that fact that ‘procedural fairness’ should prevail. Whilst ensuring that the process is fair in every way possible towards the people affected, it can easily make the principal feel detached and in the process they forget that they are actually working with human beings who have feelings and emotions. Principals then adopt what Heystek et al. (2008) refer to as a “hard approach” to the management of the process. The teachers are then seen as and treated like a resource and the human aspect of the person is not taken into consideration. Teachers who are affected by the process see such principals as unsympathetic, detached and even cruel.

## 2.8 What is job insecurity?

In his article, Pienaar (2007) states that job insecurity “generally... refers to individuals’ subjective experience that the job itself, or important features thereof, are under threat”. Furthermore,

important consequences of the phenomenon have been found in terms of employee physical and psychological health, as well as organisational performance indicators such as absenteeism and productivity. The sense that one’s job or certain aspects thereof is either under threat of being lost or changed beyond your control can be contributing factors to a sense of job insecurity. Job insecurity can lead to heightened levels of stress and a decline in the morale of staff members.

Burchell, Lapido and Wilkinson (2002) argue that:

there was also an emerging understanding that job insecurity was not only unpleasant for individuals, in terms of their psychological well-being, but that it raised serious problems for family stability and for organisational efficiency by lowering the commitment and motivation of employees.

In this thesis job insecurity will be interpreted as the fear of individuals to either lose their jobs or to be redeployed to another school. In other words their feeling of being secure in the post at their respective schools is under threat. Apart from the stress brought about by job loss, workplace change can also bring about debilitating anxieties. These anxieties include fitting in with a new staff, working with a new principal and senior management team and a new environment with its community and learners. Job insecurity brought about by the rightsizing and redeployment of teachers lead to a sense of a loss of control by the individual. In turn this heightens the levels of stress experienced by the individual. One could see that the respondents experiences led to heightened degree of job insecurity and stress. This in turn had some negative consequences, not only in their professional conduct, but also in their personal lives.

## 2.9 Teacher’s redeployment and their motivation level

Teachers in general are so overburdened with teaching responsibilities, administrative tasks, as well as maintaining learner discipline, and ensuring that

learner performance is at an acceptable level. These are contributing factors to an already low morale. It therefore does not take much for such a person's level of motivation to be dented. The ongoing rightsizing and redeployment process can in many cases be the proverbial straw that breaks the camel's back. Rightsizing and redeployment do not only lead to a decline in motivation of the person identified to be in excess, but also of the staff members who are left behind at the school after the process has been completed. Nobody at a school that has to implement rightsizing is left unscathed by the process. Even those teachers who are unaffected by the process (teachers not identified in excess) feel affected in some way by the process.

The term motivation is derived from the Latin verb *movere* which means "to set in motion" Van der Westhuizen (1991:194). This implies that a person either motivates him/herself or others to move in a certain direction. Heystek et al. (2008:79) describe motivation as "a force that energises behaviour and underlies the tendencies to persist, even in the face of obstacles". They further classify motivation as either being internal or external. Internal motivators would be those things from within that are the driving force behind a person's decision to persist. Examples of this would be an internal drive to help children or support parents to help their children. External motivators are the things (sometimes rewards) that can persuade a person to be sufficiently motivated to do the things that must be done. Examples of external motivators can be salaries, bonuses, better working conditions, etc. Motivational theories can help us to understand why teachers who are declared in excess and face redeployment, experience the process in so many ways and with different degrees of intensity. For some teachers being declared in excess can mean a new beginning, a chance to start on a clean slate. In other words this could be an external motivator to get the teachers out of a rut and present the person with new challenges. Others experience it as the death knell to their careers and a possible threat to their family life and social standing.

As was mentioned earlier, when a person's job and sense of security is threatened, it can have an adverse effect on the person's sense of identity. A teacher for example could have built up a certain identity, which can include a reputation as (for example a good, dedicated or trustworthy) teacher. S/he will have a certain rapport

with her/his colleagues. Removing a person from a secure environment against his/her will ultimately impact on his/her motivation and identity.

Various motivational theories can be used to illustrate and describe why teachers who experience redeployment may experience a certain set of emotions and feelings. Some of these theories discussed by Heystek et al. (2008:79-83) include Maslow's hierarchy of needs which says that a person's lower level needs must be satisfied before s/he can move to the next level. Teachers who face redeployment ultimately feel that their sense of security is being eroded. Maslow's theory "depends on the principle that the lowest and most basic needs must first be realised before a person can move to the next and higher levels of motivation" (Heystek et al. 2008:79). This implies that needs are satisfied and realised in an upward fashion. Any impact on one level will ultimately have a knock-on effect on the others. Aldefer's (existence, relatedness and growth) ERG theory simply states that if one need of a person cannot be fulfilled for whatever reason, that person will focus on their other needs. Again I feel that a threat to the one need will negatively impact on the other. If a teacher's means of existence, their job is for example threatened, the person might feel a sense of detachment from the rest of the staff members and his/her growth can be negatively impacted upon or even stunned. McClelland's emphasises of the needs of achievement, affiliation and power. The other theory that holds some interest for me is Herzbergs' two-factor theory of motivation. He identified, what he called, hygiene factors (salary, working conditions, etc.) as sources of work dissatisfaction and motivators to be sources of satisfaction. If hygiene factors are affected negatively, as in the case of a teacher being identified as being in excess, it may ultimately have a negative impact on the work performance of the person and their level of motivation.

## **2.10 Why do change initiatives fail?**

There are a number of reasons why people would normally oppose efforts to implement change. One of these is that people inherently resist any attempts to shift them from their comfort zones. In his article about the reasons why civil service reforms fail, Charles Polidano (2001:346) says that "most reforms in government fail. They do not fail because, once implemented, they yield unsatisfactory

outcomes. They fail because they never get past the implementation stage at all. They are blocked outright or put into effect only in tokenistic, half-hearted fashion.” In South Africa, resistance to change prevented the noble aims of redeployment being realised. I want to take the reader back to Jansen’s (2002) statements that the South African landscape was rich in policy symbolism; the government in many cases lacked the capacity to effect the intended change.

The website [www.businessperform.com](http://www.businessperform.com) lists some of the reasons for employee resistance to change as: belief that the change initiative is a temporary fad; belief that fellow employees or managers are incompetent; loss of authority or control; loss of status or social standing; lack of faith in their ability to learn new skills; feeling of change overload (too much too soon); lack of trust in or dislike of managers; loss of job security; loss of family or personal time; and feeling that the organization is not entitled to the extra effort

Educators who face the prospect of redeployment (and concomitant change) and the likely effects on them might employ some strategies to resist it. MacLane and Walmsley (2010: 65) list forms of behaviour that are typically employed by individuals to resist change. Some of them are passive forms of resistance (misuse of time and resources, misuse of information, poor attendance, poor quality work) while others are active forms of resistance (theft, destruction of property, unsafe behaviour, alcohol use, inappropriate verbal and physical actions) employed by staff. Examples of these forms of resistance can be seen in teachers who have been declared in excess and know they are to be redeployed.

Heystek et al. (2008: 31-32) note that change within an organisation can be identified and classified in terms of the individual, the group and their organisational levels. Resistance to change on any of these levels can thus hamper the initiatives to implement such changes. It is therefore important that stakeholders on all three levels must be part of the process if one expects the changes to be effectively accepted by all.

In Chapter Three I will give details of the research methods and methodologies that I employed during this research.



## CHAPTER THREE

### RESEARCH METHODS AND METHODOLOGIES

#### 3.1 Introduction

Every researcher is faced with the dilemma of choosing the appropriate research methodology to adequately and reliably address the research problem. The method used to investigate the research problem and find plausible recommendations and, if possible, a solution to the problem is in essence the research design. The research design is fundamentally a roadmap used by the researchers to enable them to plot the way in which they want to investigate the research problem. "...researchers seek to explain, describe, explore and/or critique the phenomenon chosen for study." (Marshall & Rossman, 2006: 24)

In this research, methodologies will be used to create the lens to investigate the research problem. There are various research methodologies available and as researcher, I have to find the one that will be best suited to find answers to the research questions.

In the following chapter I will focus on what qualitative research is and the research design that I will ultimately decide on. Furthermore I will focus on why the qualitative method is best suited for this particular research topic. I will also be touching on the conceptual or theoretical framework that I choose for this study. I will then try to explain why this particular conceptual framework will work best to address the issues raised by the research questions.

The field work of the research will rely heavily on interviews. I will therefore also focus on the advantages and disadvantages of using interviews as a means of gathering data.

This study would not be complete and I would not be able to claim the legitimacy of the study, unless I stay focused on the ethical issues at play in this research. I will

explain at a later stage how I addressed the particular ethical issues that related to this research.

### 3.2 Research Design

As De Vaus (2001: 9) points out,

A research design is not just a work plan. A work plan details what has to be done to complete the project but the work plan will flow from the project's research design. The function of a research design is to ensure that the evidence obtained enables us to answer the initial question as unambiguously as possible.

The lens actually refers to the research design that would give me the best possible way of investigating the research problem. The lens or research design that I chose to use when investigating the stated problems is qualitative phenomenological study. This is best suited my research because it enables the researcher to use a small sample of participants who can share their experiences of a particular phenomenon, like the rightsizing process, and shed some light on the problem under investigation.

Leedy and Ormond (2005:144) give some insight into the most common features of phenomenological design. When I looked at the purpose, focus, methods of data collection and analysis, I felt that by using this research design, I would be in a position to shed some light on the research questions. The columns below give summarise the key features:

Purpose	to understand an experience from the participants' point of view
Focus	A particular phenomenon as it is typically lived and perceived by human beings.
Methods of data collection	Interviews and any other relevant data sources
Method of data analysis	Search for "meaning units" that reflect various aspects of the experience. Integration of the meaning units into a typical experience

I investigated teachers' experience of the process of rightsizing. Teachers were given the opportunity to relay their individual experiences to me. I set out to

understand their experiences and how these have affected their behaviour, professional attitude and general wellbeing. It should be noted that when I enquire about how the process of being identified in excess have affected the participants' wellbeing or professionalism, I will focus on their own perceptions of how their general health and wellbeing was affected. The principals who will be interviewed will also be able to shed some light on this issue. They will know if these educators who were declared in excess have taken sick leave more frequently than before. Furthermore, these principals should also be in a position to say if there were any changes in the professional conduct of the teachers who were declared in excess. The question about any changes to the teachers' professional conduct would be evident from their involvement in school organisational activities or if there was any significant changes in the teachers' work ethics, involvement in school activities, their relationship with their colleagues or peers, etc. after being declared in excess.

### **3.3 Literature Supporting Evidence**

It is important that a researcher keep abreast of research that was undertaken and which is currently being undertaken, which could shed some light on the researcher's own research questions and investigation. In order to do this I read papers, books and journal articles which have a direct or related bearing on the issue under investigation. Leedy and Ormond (2005:77) argue as follows:

in a good literary review, the researcher doesn't merely report the related literature. He or she also evaluates, organises and synthesises what others have done. Evaluating the literature would ultimately mean taking what literature about the topic is available and sifting through this information with the aim to select only those pieces of information that will ultimately add value to your research.

Organising the supporting evidence would entail taking the information that has been selected to add value to the research and putting it together so that it will form an integral and meaningful part of the research. Such information must be sorted, arranged and categorised to be meaningful. The next step is the difficult task of synthesising i.e. blending the literary information with the research to either support or strengthen the arguments and findings of this research.

The main mode of gathering data was through semi-structured interviews with the participants. Janesick (2004: 72) describes interviewing as "a meeting of two

persons to exchange information and ideas through questions and responses, resulting in communication and joint construction of meaning about a particular topic". By affording educators the opportunity to relate their stories during interviews, I hoped to gain some insight into the issues under investigation so I could be in a position to relate their narratives and draw some conclusions.

The interviews I used were semi-formal and mainly semi-structured. Although a structured approach would have meant less data to analyse, I decided to use the semi-structured method instead as I felt that teachers would find it less restrictive. I hope that the semi-structured format would allow teacher to relate their stories and experiences in a way that they felt comfortable. Another reason for not choosing a structured format was that it could lead to "a lack of flexibility to respond to emergent insights" (Maxwell, 2005: 80). At no point did I challenge the views or perceptions of the participants. I will merely tried to relate their account or version of their "lived experiences". "Respondents narrativize particular experiences in their lives, often where there has been a breach between ideal and real, self and society" (Kohler Riessman, 1993:3). In essence, I give an account of the participants' experiences of the phenomenon under investigation.

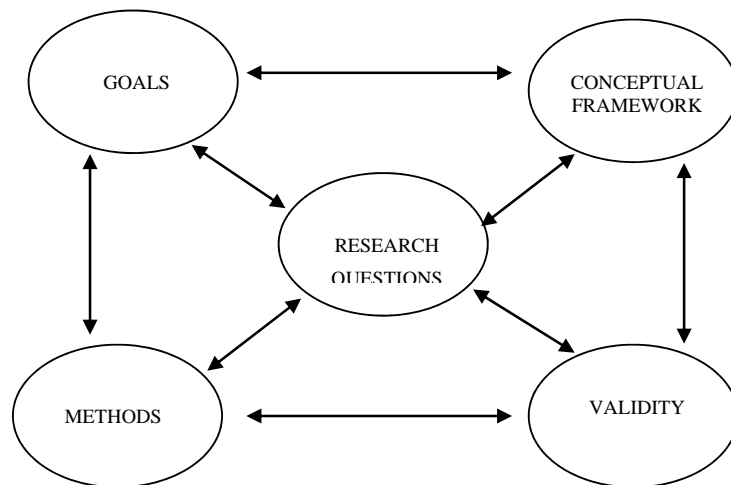
### 3.4 Qualitative Research Design

Miller (1997: 3) describes the qualitative phenomenology method of research as one of the "resources that researchers use in observing and making sense of aspects of social life". It encompasses various techniques including: "ethnography, case studies, field studies, grounded theories, interviews studies, etc." (Newman 1998: 9). This method of research is used to describe the meaning of phenomena to people. Maxwell (2005: 22-23) argues that this method would be best suited for:

- Understanding **meaning** of events...situations and experiences;
- Understanding **context**. How events, actions and meanings are shaped by the unique circumstances in which they occur;
- Identifying unanticipated **phenomena** and influences and generate new "grounded" theories;
- Understanding the **process** by which events and actions take place;
- Developing **casual explanations** of events as they occur in social context.

In my research I have set out to understand the meaning and context of the phenomenon under investigation and the processes of rightsizing as they were experienced by the teachers. My interviews and discussions with the respondents (teachers who were either at the receiving end of the process or principals who had to manage and implement it) helped me to get a better understanding of the phenomena.

Maxwell (2005; 3 – 5) suggests an interactive five component research design. The five components of his proposed research design includes: The Goals, Conceptual Framework, Research Questions, Methods and Validity. The interaction between these components can be illustrated as follows:



**Figure 1.1: An Interactive Model of Research Design (Maxwell: 2005)**

Maxwell (2005) notes that the advantage of this model is that its different components are in constant interaction with each other, unlike a linear or cyclical model where one has to go through a cycle before you can revisit a specific component. The research question is central to the Interactive Model of Research Design. This signifies the importance of having the research question central to all activities related to the research. If the researcher loses sight of the research question(s) that she/he wish to answer, then it could affect the research negatively.

The research design and method can make or break the research. Choosing the correct design helps to ensure a credible and valid research project which can withstand scrutiny by professionals in the field. This is also true in the investigation of the phenomenon of staff provisioning and its consequences on staff provisioning schools in the Cape Town area of the Western Cape.

### 3.5 Conceptual Framework

“A conceptual framework as a visual or written product, one that explains, either graphically or in narrative form, the main things to be studied—the key factors, concepts, or variables—and the presumed relationships among them” (Maxwell 2005)

I shall use this conceptual framework to describe how I approached my study of the phenomenon of rightsizing. I shall also explain what the main things are to be studied in the form of the research questions and what the presumed relationships are between them.

The main method of data collection was through interviews. The interviews were held with a number of teachers who had been redeployed in the past or who had been identified by their schools as being in excess and is awaiting redeployment. Two school principals who had gone through the process of rightsizing were also interviewed. Some of the teachers interviewed were from the two schools where the principals, who formed part of the study, were employed.

The data of the interviews were transcribed and the responses were clustered in one of the following groups:

(a) Teachers' responses

- (i) Background information on the respondents
- (ii) Teachers' experience of how the impending rightsizing at the school was communicated to them.
- (iii) How teachers feel being identified as being in excess at the school, and the redeployment affected them on a personal and professional level. Teachers will merely be communicating their feelings and perceptions of this matter.

- (iv) The level of support given, by the principal or education authorities, to those teachers identified as being in excess.

(b) Principals' responses

- (i) Criteria used to identify the teachers
- (ii) Procedures followed to do the rightsizing
- (iii) The impact on the teacher's professional abilities. The principals will relay their perceptions on this issue.

Clustering of the responses enabled me to make sense of the respondents' stories. Next I explored the 'meaning units' in the clusters that reflected various aspects of the experience" Leedy and Ormond (2005:144). Finding the meaning units in this study would ultimately mean being able to look at the experiences of the various participants, group them and describe and relate their account of the experience in a coherent manner. In cases where some of the respondents discussed issues relevant to this study that could not be clustered under one of the groups listed above, another was created.

### **3.6 The Research Sample**

The research sample of a study refers to a group of people chosen that would in all probability be representative of a greater group of individuals who meet certain criteria. In other words it is a purposive sample of the group being studied who experience certain phenomena under investigation. The sample chosen must be trustworthy and the researcher must ensure that the conclusions drawn at the end of the study will be a fair representation. Such a sample can be critical in the trustworthiness of a study.

It is impossible for a researcher to study every single person who are experiencing the phenomena under investigation. For that reason, "...the researcher [does] ... not [usually] study the entire population of interest. Instead he or she will select a subset, or sample, of that population" (Leedy & Ormond, 1989: 210).

The research sample for my study consisted of a maximum of four teachers and two principals. I employed a purposeful convenience sampling which enabled me to “select those individuals or objects that [would] yield the most information about the topic under investigation”. (Leedy & Ormond, 2005:145). The persons selected were individuals who were identified as being in excess and were ranked as post level 1 (teacher), post level 2 (Head of Department / Education Specialist) or post level 3 (Deputy Principals) teachers. The teachers are individuals who had been declared in excess at a school and had been redeployed to another school or who were awaiting redeployment. A process of convenience sampling sufficed for the purpose of this study. I sourced these teachers from persons who met the above criteria and who agreed to form part of the study. My request for participants had a snowball effect. Teachers who heard about the study not only wanted to be part of it, but also offered the contact details of other teachers they knew who had been affected by redeployment. The main reasons why I chose to use a group of teachers who volunteered their participation in the study were the time constraints and the limited scope of this study. I also hoped that the participants would be more open to giving an honest and reliable account of their how they had experienced being declared in excess and / or being redeployed.

I recognised the danger that teachers with a grudge who wanted to settle a score with their principals (current or past) might volunteer to participate in the study so I was alert to this possibility when I did the interviews. As I said earlier, I did not challenge teachers’ perceptions of their experiences even when I was aware that they might be overly critical of the process or the principals. To challenge the participants would not be the most appropriate approach to use when people are telling their stories because it could have a negative effect on how and what they tell.

Two principals were selected from two different schools to form part of the study and thus shed light on the selection criteria used when an educator was declared in excess. I felt they would also be able to offer some insight into the problems that a school experiences when teachers are redeployed. The schools selected would be schools where one or more of its educators had been declared in excess. School A was one that was able to absorb the loss of the post by employing a teacher out of school funds. In other words, the school governing body was able to re-appoint the



teacher or a different teacher to absorb the workload. School B was one where the school did not have the financial resources to employ a teacher out of school funds to absorb the workload of the teacher who was declared in excess. The workload of that teacher therefore had to be redistributed amongst the remaining teachers.

### **3.7 The Interviews**

I set up interviews with four teachers who had been declared in excess. I asked them questions related to their qualifications and their number of years teaching experience. This information helped me to gain an insight into whether the teachers were selected on grounds of their lack of qualifications or experience. This information was correlated at a later stage when the principals are asked to elaborate on the basis for selecting particular teachers. It was interesting to compare what the teachers perceive to be the reasons for being identified as being in excess with the reasons given by the principals for identifying a particular person. Teachers were also asked to relate their experiences of being identified as being in excess and how this has affected them on a professional and personal level. The interviews were recorded on audio tape with the permission of the participants, so that their responses could be transcribed at a later stage. As the interviews were semi-structured, I was able to delve deeper and clarify their responses.

The interviews were held at a place that was most convenient for the teachers concerned. In cases where they requested that the interviews be conducted at their respective schools, I got permission from the principals to set up the meeting there. If, however, they chose to have the interviews on 'neutral ground' then I held the interview at place and time that suited them. The same modus-operandi was followed for the interviews with the principals.

### **3.8 Research Ethics**

The biggest problem in conducting a science of human behaviour is not selecting the right sample size or making the right measurement. It's doing those things ethically. (Bernard, 2000:22)

Leedy and Ormrod (2005:101–102) suggest that “most ethical issues in research fall into one of four categories: protection from harm, informed consent, right to privacy, and honesty with professional colleagues”. For these researchers, **protection from harm** means “researchers should not expose participants to undue physical or psychological harm” (Leedy & Ormond, 2005:101). Participants in my study were informed beforehand that they could withdraw from the study at any time. Furthermore, the nature of the questions was not such that they could cause some psychological harm to the participants. Participants were also reminded throughout that they could refuse to answer a question if they did not feel comfortable doing answering it. They were also encouraged during the interviews to inform me if any of the questions caused them any ‘discomfort’ or if they felt ‘agitated’ by it. None of the participants communicated such feelings to me during the interviews.

Taking account of the need to have **informed consent** meant that the participants had to be told the nature of the study to be conducted and then given an opportunity to choose whether they wanted to participate or not (Leedy & Ormond, 2005:101). All participants in my study received a letter outlining the research that I was planning and what I hoped to achieve by doing it. In this letter it was made very clear to them that their participation in the study was voluntary. They also got a brief description of what their participation in it would entail. The name and contact details of my supervisor was communicated to them so that they could at any time verify details. Participants were assured that they could withdraw from the study at any time and that their decisions in this regard would be respected.

Respecting the **right to privacy** meant protecting the identities of the participants and the participating schools. The participants were only referred to as respondent 1, 2, etc. and the schools were called school A or B.

Finally, **honesty with professional colleagues** involved reporting my findings in a complete and honest fashion without misrepresenting what I had done or intentionally misleading others about my findings. I honoured the call not to fabricate data to support a particular conclusion, no matter how seemingly “noble” that conclusion might be (Leedy & Ormond, 2005:102). After the interviews the participants were given a copy of the transcript and asked to verify that it was a true

reflection of what was said during the interviews. After the interviews were transcribed, participants also had an opportunity to read through the transcripts and clarify any issue that they felt had not been transcribed accurately.

In line with the criteria stated by Brewerton and Millward (2001:62 - 63) I ensured that the following ethical criteria were adhered to in my research:

- (i) I ensured that I only involved people after obtaining their written consent;
- (ii) Participants were briefed verbally about the nature and the extent of the study before I obtained their consent.
- (iii) They also received a letter outlining the reasons for the study and what their participation in the study would entail.
- (iv) The participants were made aware of the fact that they could stop the process and withdraw from the research at any time.
- (v) Participants were assured that they did not need to answer any of the questions if they felt uncomfortable doing this.
- (vi) They were assured that their identity and the identity of the schools would not be revealed at any time during the study or when the study was published. The participants were referred to as Respondent 1, 2, etc. and the schools were labelled as School A or B throughout the research report. In this way anonymity of the participants and the participating schools was assured.
- (vii) Participants understood that the findings would be presented in the form of a report to a third party, supervisor and examiners, and they did not have any objections to this. A copy of the research report would be made available to participants and participating schools at their request.

As a researcher I have a duty, not only towards the participants in my study, but also towards the research community to ensure that the above ethical issues are not compromised in any way. I believe firmly that the steps that I took will ensure that the validity and trustworthiness of the research.

### 3.9 Limitations

Marshall and Rossman (2006; 42) stress that “all proposed research projects have limitations”. They quote Patten (2002: 223) as saying that “a discussion of the study’s limitations demonstrates that the researcher understands this reality”. As a researcher, I am aware that this study is limited. Every effort was made to have a sample that was as representative as possible, but I am aware that the sample chosen was a very small group so it might not be totally representative of the population. Individuals who might have a valuable contribution to make might have been excluded from the study. However, I am confident that the data gathered could be applied to the greater teacher population who have experienced rightsizing and redeployment.

It is true that the issues under investigation are very emotive. Participants were asked to relay their personal experiences of the redeployment process. The fact that they had been selected for redeployment might have prejudiced them and made them critical of the process. Teachers who harbour some resentment against the process, a specific school or principal could be included in the study. Whilst such individuals might have a valuable contribution to make towards this study, it is possible that they might be overly critical of the process. As a teacher who has had some experience of the phenomenon at my school, I might have been influenced by my own feelings and prejudices. I tried not to let these affect the study.

In spite of these limitations, I feel that I have been able to get a fair and honest representation of the issues under investigation.

In the next chapter I will focus on how teachers and principals experienced and dealt with the process of rightsizing and redeployment, as well as their perceptions of how it affected their professional work attitude, their personal lives and health. Finally, I explore how they managed to cope with the process.

## CHAPTER FOUR

### TEACHERS' EXPERIENCES OF THE REDEPLOYMENT PROCESS

#### 4.1 Introduction

In this chapter I focus on the analysis of the data gathered during the fieldwork or data collection phase. The data were collected by doing interviews with the respondents. The information gathered was then collated so that the accounts of the individual respondents could be interpreted. My aim was to gain an insight into the issues that teachers grapple with when dealing with the issue of staff provision in schools and the consequences of redeployment. The accounts of the respondents are presented to give the reader an idea of how the process of rightsizing and redeployment affects the individual. The human stories of the respondents are told without challenging the issues raised by them, so that their fears, frustrations and concerns can be heard. This chapter seeks to tell the “lived experiences” of the teachers during the rightsizing process.

A total number of four (three female and one male) teachers who were declared in excess were interviewed. Of these four respondents, three teachers were subsequently redeployed. The fourth teacher was retained at the school where she was declared in excess because an older staff member decided to take an early retirement package in order to ‘save’ her colleague from redeployment. Two principals at different schools who had to go through the process of declaring teachers in excess were also asked to relay their experiences. The two principals interviewed had been involved the rightsizing of three of the teachers who participated in the study. In this part of the thesis I use the terms ‘Coloured’, ‘Black’ and ‘White’ as descriptors. This was the way in which people were classified before 1994. Although these terms are still used by state departments and various private institutions to gather data, it is unconstitutional to use these terms as a basis to discriminate against any ethnic group. These terms will be used only to give the reader an idea of the learner and staff demographics of the schools under investigation and to what extent integration has occurred.

## 4.2 Analysing the Data

Data analysis had to be done from the transcripts of the interviews with the respondents. I used the route of analysing the data and clustering similar responses, so that the responses of respondents with similar issues could be grouped. The information given by the respondents was placed in one of the following categories:

### **(A) Teachers in excess**

- (i) Background information on the respondents
- (ii) Teachers' experience of how the impending rightsizing at the school was communicated to them.
- (iii) Teachers' feelings and perceptions about being identified in excess at the school and the redeployment and the affect on them personally and professionally.
- (iv) The level of support given, by the principal or education authorities, to those teachers identified as being in excess.

### **(B) Principals who had to manage rightsizing and redeployment**

- (i) Criteria used to identify the teachers
- (ii) Procedures followed to do the rightsizing
- (iii) Principals' perceptions of the impact of being declared in excess on the teacher's professional abilities?

## 4.3 Profile of Respondents

### 4.3.1. Teachers

A total of four teachers participated in the study. The study involved primary schools teachers in two of the education districts within the Western Cape. The following table presents a profile of the participants.

	Sex	Post level when redeployed	Number of years teaching experience	Phase where you have the most experience	Highest qualification
Respondent 1	Female	2	24	Senior & Intermediate Phase	BA, HDE
Respondent 2	Male	1	12	Senior Phase	HOD
Respondent 3	Female	1	16	Foundation Phase	DE III
Respondent 4	Female	1	16	Intermediate Phase	BEd (Hons) Special Needs Education

**Table 3: Profile of participants**

Female respondents are in the majority of those identified as being in excess. A possible reason for this is that there are more female than male teachers. A principal provided another explanation when he said:

*In my schools case the SGB decided to retain the few men at our school. We are in a high risk area and need the 'man' power desperately. Schools have a shortage of male teachers and therefore choose keep them at the school.*

At the two schools under investigation, the teaching male staff complement made up an average of 15% of the staff members. At the time when they were declared in excess, the respondents had an average of 17 years teaching experience. The staff members at both schools were older, and most of them had taught at those schools for ten or more years. The schools had not had newly qualified teachers employed for a number of years. One principal attributed this to the fact that permanently employed teachers tend to stay.

#### 4.3.2 Schools and principals

Both schools are primary schools. School A in the past catered for the children of White communities. It caters for learners from grade R to 7. It is situated in a built-up residential area. Housing units are mortar and brick structures which are well maintained. Most of the residents in the area are older people who have been living

there for years. As a result, the majority of learners enrolled at the school are from outside the immediate feeder area of the school. They are transported to school by public transport or by parents who drop and collect their children every day. This school has an aftercare centre for children whose parents can only fetch them after work. Parents pay extra to have their children enrolled at aftercare. The school has seen some significant integration in its learner and staff composition. Up to 60% of its learners are Black and Coloured whilst 35% of the teachers are Coloured, mainly because the majority of learners are transported from nearby previously Coloured only areas. Parents are mostly part of the middle to higher income groups. Twenty-five per cent of the staff members (teaching and non-teaching) are employed by the school governing body (SGB). The teachers employed by the SGB receive a salary equivalent to what the WCED pay a post level 1 teacher. These teachers are entitled to paid sick leave. They receive a thirteenth cheque at the end of each year equivalent to a month's salary. This is all paid for with funds raised from the parents through school fees and fund raising efforts in which parents and learners are compelled to participate.

School B is situated in an area that caters predominantly for Coloured learners. It offers dual medium classes from grades 1 to 7. It serves people in the lower income group, as is evident from the basic low cost mortar and brick housing units in the area of the school. Many of these houses have informal structures (shacks or Wendy houses) built in the yard to accommodate large or extended families. There are also three informal settlements (serviced squatter areas) within walking distance from the school. Serviced squatter areas are informal settlements for which the municipality have provided the basic services like shared running water (outside taps) and communal toilet systems. A large percentage of these parents are dependent on the monthly grant that they get from the state. Those people in the area who are fortunate enough to have work are blue collar or factory workers who earn wages that would classify them as low income workers. According to the principal, up to 90% of the parents cannot afford to, or do not want to, pay school fees. In January 2009, the school had a learner total of 1 145 learners and 32 teachers. There is virtually no integration since only eight of learners come from the nearby Black township and the staff complement is Coloured. They have an average of 45 learners per class, but the grade 4 classes have up to 50 learners per



class. The grade 7 classes have an average of 35 learners per class as a result of the high drop-out rate amongst learners in the senior phase. The principal, deputy and two senior teachers are not class teachers, but offer certain subjects in the Senior and Intermediate Phases. Teaching staff have to cope with various socio-economic problems which have negative spin-offs for the school. These include constant burglaries and vandalism, absenteeism, anti-social behaviour of learners and poor parent involvement.

#### **4.4 Procedures followed to inform teachers of imminent rightsizing**

Teachers at the two schools did not have the same experience of the processes followed to inform them of the imminent rightsizing. At School A, the principal called a staff meeting early March 2007. He informed the staff that the tenth day enrolment totals indicated a drop in the number of learners enrolled at the school compared to the same period in the previous year. His (the principal's) calculations showed that the school would lose two teacher posts when the staff establishment was made available in September of that year, and some teachers would be declared in excess at that point. The principal stressed that although every teacher at the school was invaluable to the institution, he would have to weigh up the needs of the school and make decisions accordingly. Staff members were encouraged to apply for posts, especially promotion posts, at other schools when a new List of Vacancies became available. The List of Vacancies is a document that is made available at least twice per year by the Western Cape Education Department. In it all posts – post level 1 (teacher), post level 2 (Education Specialist / Head of Department), post level 3 (Deputy Principal) and post level 4 (Principal) – are advertised and teachers can apply for these posts.

The process was handled differently at School B. Rumours first surfaced at the school in early October 2007 that the school had received the staff establishment for the New Year and that some posts would be lost. There was no official word from the office (principal and senior staff members) and this fuelled the rumours at the school. Three weeks after the rumours surfaced, the principal called a meeting to inform the staff members that he had received the staff establishment. He confirmed that the school would lose a post level 1 teacher's post. At that stage he

was just willing to say that the School Governing Body would look at the situation and that he would get back to the staff at a later stage. Staff members were in a frenzied state because of the way in which this delicate matter was handled by the principal. They felt that he was unsympathetic towards the majority of teachers who were in the post level 1 category and who faced redeployment. All teachers at the school who were on post level 1 were on tender hooks awaiting further developments. The principal from School B had this to say:

*You must understand that this (rightsizing) is a very unpleasant task. The whole situation is dumped in your lap and as principal you have no option but to deal with it. I deal with it by dealing with the situation as a clinical process. I have to determine what is in the school's best interest. No matter which way the decision goes, someone is going to feel that they are being unfairly targeted.*

As I have already said, these teachers at School B experienced some level of job insecurity (as described in Chapter Two) as a result of the impending rightsizing process. In the following section I will give some more detail regarding job insecurity.

#### **4.5 Criteria used when identifying teachers**

When asked about the criteria used by the school to identify the teachers who would be declared in excess, both principals claim that the process was entirely fair. One principal said:

*The interest of the school is central to any decisions taken. You must also remember that the whole process is steered by the Governing Body. An analysis was done to determine where the school can 'afford' to make the cut without causing too much disruption to the school program and coherence*

Another principal said that:

*The circuit manager scrutinised every aspect of the rightsizing process. The instruction right from the start (from the area office) was that there must be no reason for teachers to dispute the process. Everything must be done according to the book.*

He emphasised the fact that the correct procedures had to be followed. When asked about the involvement of unions in the process, he claimed that schools are not compelled to have union representatives present. They (schools) could, however, invite such representatives to observe the process if they wanted to.

One of the principals admitted that the SGB had decided that the school could not lose any of the few male staff members as they needed these individuals so that there is a “sense of security” on the school grounds.

Teachers at grassroots level do not necessarily buy into the claims that the process is fair and transparent. They feel that the principal has some power to manipulate the process:

*He (the principal) decides what is needed at the school and merely conveys this to the governing body. They (the SGB) just follow him blindly without questioning his motives.*

## **4.6 Effect of being declared in excess**

### **4.6.1 Personal effects**

The respondents all felt that being declared in excess had a negative effect on their personal well-being and health. One respondent said:

*There were instances in the past where I was sick and would drag myself out of bed to be at school. After I was informed that I would be declared in excess, I was off sick more often. I think that I just did not care anymore. It was not that I was too lazy to go to school. I was in and out by the doctors more often than ever before. A common cold for example would get me down for days, sometimes weeks.*

The teacher impressed upon me that she was the type of person who would be on the job no matter what the circumstances. She would sometimes neglect her family because she would put off taking her own sick children to a doctor as she had to be at work (school). She would thus put school before her family. One can therefore understand that the teacher ‘felt betrayed’, as she said at a later stage, when she was declared in excess.

After being declared in excess, the families of the respondents were also on the receiving end of the mood swings and bouts of depression. Some of the respondents described being short tempered, aggressive and just being agitated by trivial things happening in class and even at home. Children and spouses alike were on the receiving end of the erratic mood swings of the respondents.

*I would sometimes lose my temper and would be in a state. My family and even my learners would bear the brunt of these outbursts. I would realise at a later stage that I had over-reacted to a minor situation.*

Respondents reported experiencing a sense of burnout. Pienaar (2007) describes burnout as

a state of emotional and physical exhaustion caused by excessive and prolonged stress. It can occur when you feel overwhelmed and unable to meet constant demands. As the stress continues, you begin to lose the interest or motivation that led you to take on a certain role in the first place. Burnout reduces your productivity and saps your energy, leaving you feeling increasingly hopeless, powerless, cynical, and resentful. The unhappiness burnout causes can eventually threaten your job, your relationships, and your health. These individuals experienced severe sleep deprivation and excessive tiredness. This is not necessarily a physical tiredness, but a mental tiredness - not having the will or energy to tackle even the smallest of problems and challenges, both at home and at work.

In the words of one of them, respondents who participated in the study described “breaking down, crying, sleepless nights, worrying, anger, disappointment, exhaustion”. One respondent reported experiencing anxiety attacks. These attacks were so severe that her medical doctor referred her to a psychologist for counselling. She subsequently attended counselling sessions for more than eight months.

*The attacks were so bad that it would feel like I am dying. I could not breathe and felt like there was a heaviness pressing down on my chest. I thought that my heart would stop at any minute... The attacks would come any time... during the day or even at night. I would sometimes be in class when I felt an attack coming on. I once had an attack while at one of the shopping centres. People must have thought that I was crazy... I just dropped everything and ran out of the*

*store. Lucky for me my husband was with me and he could take me to a doctor for medication.”*

#### 4.6.2 Professional effects

Being declared in excess or redundant at any job can have detrimental effects on a person's life. If you see yourself as a person who has given more than is expected, it can be a particularly hard blow to deal with:

*I gave everything to the school ... every bit of energy went into helping to build up the school and the learners. After that (being declared in excess) I just did not care anymore.*

When there is the perception that teachers who are of less value to the institution are allowed to stay, the whole process can be so much more hurtful for the individual. This leads to resentment towards the institution, principal and even the rest of the staff.

*Those people (teachers) who never did anything for the school...who were a zero on a contract ... they could stay. I did so much for the school, but had to go. That is difficult to accept.*

It also has a very negative impact on the person's professional attitude at the school. A principal describes the changes that he observed in a teacher after he (the teacher) was declared in excess as follows:

*I could see that there was a drop in the teacher's performance at the school. He would be late more often ... at times ignoring tasks given by the office and very often he did not meet deadlines. I had to call him in more than once to reprimand him about the situation. I think this made him more resentful towards me and the school.*

Teachers who are declared in excess feel there is a stigma attached to them. In their perception, the other teachers and principals think that only lazy, undisciplined teachers at a school are declared in excess.

*If you therefore apply at a school, they think that you are one of those teachers who fall into that category. You are labelled even before you had an opportunity to prove your worth. You actually feel a sense of shame that you were the one chosen.*

Another teacher said that:

*It makes a person doubt yourself. You ask yourself questions like – was I such a bad teacher that this would happen to me? Don't all my years of dedication and hard work mean anything? Nowadays I just do what is expected of me...nothing more, nothing less. Why should I give everything when the same thing could happen again?"*

This is a sentiment expressed by more than one teacher who formed part of the study. They will not do more than is expected of them in terms of the conditions of employment. The teachers feel that they will not be caught in a situation again where they do so much and are then declared in excess. The fear of all respondents was that they would ultimately be the ones who would have to leave when rightsizing took place again at their schools.

*I get the feeling that I will have to go again when the school have to lose someone in future.*

*What is the use of it all? I am sitting here... I do my work and wait for the next round of redeployments.*

Although the other respondents did not mention that they had experienced stress, some of them described a few of the classic signs that could be stress related: *having problems sleeping, panicking when they would think about the situation that they are in, feeling sick, just wanting to give up, etc.*

Other respondents use descriptors like *irritable, restlessness, mood swings, general negativity, inability to cope, emotional outbursts and feelings of frustration and inability to trust*. These are some of the classic signs of stress related disorders as described by Hart (2007) and the American Institute of Stress (2008). Brown, Ralph and Bremer (2002: ) point out that “[s]tress and organisational change like downsizing can be the cause of increased absenteeism and low morale”.

#### **4.7 Support by school and education department**

The respondents felt that there was very little or no support for the teachers who were identified as being in excess. The one teacher felt that they were ‘discarded’ at

the school, especially by the principal, where they have put so many years into. Respondent 1 puts it as follows:

*Two teachers were declared in excess at that time. After the principal had informed us that we would be declared in excess, he basically broke all contact and ties with us. We were still at the school for a few months after being declared in excess. The principal however informed us that we do not have to attend staff meetings or school functions anymore. We were outcasts who could not mix with the other people. I felt bitter.*

The only measure of support from the Western Cape Education Department was that it compelled schools where vacancies existed to shortlist teachers who were declared in excess at other schools. Those teachers had to be invited for interviews and considered as possible candidates. In terms of the preface to the WCED List of Vacancies 1/2008, section 1.3, "A teacher who is in excess and applies for a post must be shortlisted for that post if his or her current rank is the same as the rank of the post for which he or she is applying, i.e. if he or she will accept a horizontal transfer."

Other than that teachers feel that they are basically outcasts after the process has run its course. They feel abandoned by not only their employer, but also the Unions who are supposed to protect their rights:

*... those fat cats in the unions only care about themselves. When I complained to my (union) rep, I was told that they can only investigate if there is prove that the process was procedurally flawed.*

The teachers also claim that they did not get much support from the WCED or education officials.

## **4.8 Perceived problems associated with rightsizing**

### **4.8.1 Abuse of Power**

Some of the respondents felt that the principal is in a position to abuse the power that s/he holds over the educators. It is felt that as principal of the institution he/she has powers delegated to him/her by the WCED. This coupled with the perceived

'power' that he/she wields over the school governing body makes him/her even more powerful:

*I have no faith in the Governing Body. They allow the principal to pull the wool over their eyes. Whatever the principal says is law. I was co-opted to the Governing Body when a teacher, served on it, was on sick leave for three months. I saw how (the principal) would tell them (the governing body) Everything he said would be accepted by them. Nobody challenged him. He goes to the meetings every month ... tell them what he has done and that he is still going to do ... just so that it can be minuted so that his actions are 'lawful'. I have witnessed how he treats them like a bunch of kids.*

Teachers perceive that this (delegated and perceived) power can become a dangerous weapon in the hands of a ruthless principal who is out to 'settle a score with a staff member' for whatever reason. A principal was asked to respond to this perception and had the following to say:

Do they really think that I or any other principal would be so petty as to hold a grudge against a staff member and use my power to get rid of that person? Principals are professional people who conduct themselves in a professional manner.

Another principal responded in the following way to the accusation that he manipulates the governing body members:

*At my school the governing body members has on average a grade six education. I do not have any say about which parents get elected to represent the majority of parents on the Governing Body. I get this group of people and have to work with them, no matter what their limitations. Yes, at times I tell them what needs to be done for the sake of moving forward on a matter. This, however, does not mean that I am manipulating them. They have a right to disagree with me at any time and there have been times in the past where they have done just that.*

#### **4.8.2 Workload**

Teachers in general agree that the workloads of those who remain at the school are increased by rightsizing. The work of the person who is redeployed has to be redistributed between the remaining teachers on that post-level at the school. It is seldom the principal or senior staff members who feel the burden.



*They just give the class teachers bigger classes and say that there is very little that can be done about it. You either accept it or it could be your posts that might be in jeopardy in future. We sit with 40 to 45 learners per class at this school. I can't even walk around in my classroom. I have to squeeze sideways through the desks to get to the learners. In a school where the majority of learners are experiencing socio-economic problems like poverty, alcohol and drug abuse, neglect, physical and sexual abuse – to mention but a few, this is a recipe for disaster. We experience severe disciplinary problems and I think it is directly related to the overcrowded classes we have.*

Other than the academic workloads that increase for those who remain, there are other spheres of school life that still need to go on in spite of the setbacks. Schools have extensive extra-mural sports and cultural activities that have to go ahead. Those who remain are expected to take on the workload of the teacher who has left.

#### **4.8.3 Labelling of the excess teacher**

Teachers identified for redeployment feel that they are labelled by others as being the lazy, no-good teachers at the school. Labelling is a result of other people's perceptions or the stereotyping of a person or group. Certain characteristics, either positive or negative, are attached to the person or group on the grounds of false perceptions. Why is this? If there are clear criteria to determine who is in excess, why are they labelled or feel they are labelled?

A respondent was redeployed to a school where she was not the Governing Body's list as their first choice of candidate to be appointed in the post. The general procedure is that, the Governing Body lists the candidates interviewed in order of preference for the post. This list is sent to the Education Department as the recommendation of the Governing Body for the post to be filled. The candidate at the top of the list is the teacher considered to be the most suitable person for the job.

In this case the preferred candidate was employed as a temporary teacher at the school for a year prior to the post being advertised. The Education authorities overturned the Governing Body's recommendations and redeployed the respondent who was in excess at another school to fill the post. The respondent had the following to say:

*I have had the unpleasant experience of joining a new staff after redeployment. Some people are kind and make you feel welcome, but some of them are very hostile. They (new colleagues) look at you as if you are something that the cat dragged in. I think one of the aspects that made them so hostile was because their friend was not employed to fill the vacant position. I truly felt like an outsider for a long time and they made a point of showing me how they felt about me. They would be uncooperative, gossip about me, ignore me to the extent where some people would not even greet me or just got up and left if I should join their company. You have to prove yourself all over and show that you were not redeployed because you are one of the lazy no good teachers. It took a long time before I felt that I belong.*

- (c) It should be noted that Resolution 7 of 2002 (PSCBC) spells out the rules applicable to redeployment as follows:
- (b) *All employees affected by transformation and restructuring process must be:*
    - (i) *treated fairly and in terms of relevant legislation and collective agreements; and*
    - (ii) *informed of the process to be followed in attempting to suitably accommodate them in the public service and any other sphere of government.*
  - (c) *The employee may make representations on his or her own behalf or be assisted by a representative.*
  - (d) *The employer must duly consider the representations made by the employee and/or his or her representative before making a final decision.*
  - (e) *An excess employee may only be appointed in a post at a level equivalent to his or her post immediately before he or she became in excess.*
  - (f) *The employer must apply measures to facilitate and enhance redeployment, which includes:*
    - (i) *provide training for excess employees to meet the requirements of vacant posts;*

- (ii) allow employees to retire early;*
  - (iii) where appropriate, approve applications for a severance package to excess employees who apply for that package as provided for in clauses 8.2(b), 8.3(b) and 9.2(a); and*
  - (iv) fill existing vacant and funded posts.*
- (g) Excess employees must participate in the redeployment and retraining process.*
- (h) Subject to due processes, including being offered the opportunity to make representations, employees who unreasonably refuse to be redeployed will be deemed to have resigned.*

Furthermore, the Area Office of the WCED, particularly the IMG (Institutional Management and Guidance) Advisors, must assist the principal in the execution of the rightsizing process.

One can see that educators find being identified as being in excess and then redeployed an emotionally draining experience. The fact that these individuals feel unwelcome at schools and unappreciated by their seniors and peers makes the whole experience so much worst. At the very least, these educators could become resentful.

In the next chapter I will draw some conclusions from the study and make a few recommendations.

## CHAPTER FIVE

### CONCLUSIONS AND RECOMMENDATIONS

#### 5.1 CONCLUSIONS

##### 5.1.1 The Rightsizing Process

We have to accept that rightsizing is here to stay. It is a process used not only by the education sector, but also by almost every other sector, to bring their staff complement, company needs and available resources in line with each other. In order for organisations to remain relevant in a global society, they must be able to adapt to the challenges that they face, but they have to do so within the constraints of a specific budget. In the case of South Africa, fiscal discipline aimed at reducing spending and the need to use available human capital optimally also influence the decisions planners and top management make.

As pointed out earlier, a significant proportion of the budget, 6% of GDP and 21% of the national budget (Soudien, 2007), goes towards the funding of education. At present the largest portion of this is spent on staff remuneration. Since the education department, which is committed to neo-liberal policies and fiscal discipline, has to work within the constraints of a limited budget to fulfil all its needs and social responsibilities, it is unable to employ more teachers. The education department, therefore, uses rightsizing to ensure that the available teachers in the system are allocated to schools where there is a need. This means they have to take teachers away from schools where there are more teachers than the current teacher-learner ratio allows.

In some cases rightsizing is handled in a very sympathetic manner. The fears of teachers are acknowledged and the process is dealt with in a manner that is perceived to be fair and open. In such cases all those affected feel that decisions were taken in the interest of the school and the community that it serves. In these cases, the decisions taken are more likely to be accepted and understood by all affected.

In the perception of some teachers at the receiving end of it, the process is not being conducted in a fair, equitable and transparent manner. This is particularly true when the school principal appears to handle the rightsizing process as an opportunity to deal with staff with whom he is at loggerheads. The mere perception that the outcome of rightsizing is determined on these grounds can seriously damage relationships and trust between colleagues, management and the education authorities.

In the next subsection, I make some observations on some things that can influence the way educators experience the process of rightsizing. I also make some general recommendations.

### **5.1.2 Job Security**

The remarks made by some respondents are in line with Pienaar (2007). They contend that the phenomenon of job insecurity significantly affects employee physical and psychological health. They specifically emphasise that organisational performance indicators such as absenteeism and reduced productivity reflect how teachers respond to a lack of job security. The sense that one's job or that certain aspects relating to one's professional life are either under threat of being lost or changed beyond one's control affect one's sense of security. Job insecurity leads to heightened levels of stress and a decline in the morale of staff members. Stress or a decline in morale has a detrimental effect on the general well-being of the teachers concerned. Individuals feel powerless and this in turn can lead to less productive and less motivated staff members. The employer and managers must not at any time underestimate the negative effects that the threat to job security can have on an organisation and its employees.

### **5.1.3 Stress Factor**

A certain amount of stress can be beneficial. However, as is well-documented, high levels of stress caused by job loss or even the threat of job loss negatively affect the well-being of those concerned. Stress results not only from the knowledge that one's job is in jeopardy. Most teachers are individuals who have financial commitments and families they are responsible for. The fear of not being able to

meet their commitments and responsibilities would also be stressful. This could not only affect their personal lives but also those of their families.

The respondents who formed part of this study expressed the view that they were given only limited support from the WCED and principals.

#### **5.1.4 Personal and Professional Effects of Being Declared in Excess**

Teachers describe varied emotions when being declared in excess. These include anger, frustration, and feelings of helplessness, shame, mood swings, worry, bitterness and feeling overwhelmed. These are all emotions that can negatively affect a teacher's professional performance. On the one hand, teachers who are declared in excess question their identities and try to find a "fault" within themselves. They equate being identified as being in excess with being a 'bad' teacher. On the other hand, they further conclude that if all their dedication and sacrifices at the school did not have any impact when their fates were decided, then going the extra mile was of no value.

Whenever the process of rightsizing is to be implemented at a school, the teachers should have the reassurance that the interests of the school will be paramount in any decisions that need to be taken. It should be conceded, however, that it might be difficult for teachers to understand and accept that it might be in the best interests of the school for them to leave. We all want to believe that we are irreplaceable and the 'best' for the school. A principal, however, had a different opinion when he said that:

*We see the bigger picture. It is not about the individual person and his/her small world. We must not only consider curriculum, but so many other spheres of school that a class teacher for example does not even know exist. I have to look at what is best for the school ... now and over the long term.*

It is difficult to convince teachers that what they perceive to be true is not always so. It is therefore important that the actions of all role-players (principal, School Governing Body, Departmental officials) should be such that teachers would have

no reason to question the integrity of the process. This means that the whole process has to be handled in an open and transparent manner.

### **5.1.5 Support to Teachers**

Teachers feel in general that they do not get any or enough support to deal with the emotional impact of being declared in excess. Those involved in the management of the process may not be fully aware of how it can have an impact on the psyche of the individual teachers. It may also be that in trying to detach him/herself from the process of rightsizing because it reduces the chances of disputes being declared, the principal adopts a very clinical manner. This is unfortunate. Professional handling of the rightsizing process should not be done in an inhumane manner. It is especially in these difficult times that teachers should know that they have the support of the management team of the school where they have spent so many years.

## **5.2 RECOMMENDATIONS**

### **5.2.1 The Rightsizing Process**

The rightsizing and redeployment process should be handled in a fair and transparent way. The teachers must at all times believe that though this process is unavoidable, their best interests and that of the school will be weighed and protected by all role-players (i.e. education department, unions and school management). If it is decided that letting a teacher go is in the best interests of the school, the teacher should be briefed and counselled in a sympathetic and professional manner. In my opinion, there are too many 'grey areas' when dealing with rightsizing. What I mean by this is that there are not clear, accessible guidelines that all stakeholders in the process could consult. It seems that principals should be given a clear set of guidelines on how to handle rightsizing and redeployment so they can manage the process sympathetically and fairly. At present, principals seem to assume that he/she (alone) knows what is best for the school and has the final say in the matter. This could be because the SGB and Area Office officials merely rubberstamp the principal's recommendations or decisions in some cases. A clear set of guidelines, set up in consultation with principals,

teachers and departmental officials would go a long way to addressing these concerns. The mere perception that the process of identifying an individual in excess and the redeployment of the person is flawed can cause irreparable harm to the credibility of the process.

### **5.2.2 Job Security**

The fact that the educator staff establishment is determined annually makes teachers fear imminent rightsizing and ultimately redeployment. Although job security (or the lack thereof) is not unique to the education sector, the fact that the process is on the agenda every year creates the impression that it is a never ending story.

The fear of redeployment is the highest cause of stress that teachers face. Those who have already been through the experience of being redeployed feel even more insecure. Even though there is no basis in fact for their fears, they are convinced that they will be first in line for redeployment at their current schools. Even if the LIFO (last in, first out) principle is applied, other teachers at the school could be identified. 'Last in' (LIFO) does not mean that the last person to join a school's teaching staff automatically has to be redeployed. A previously redeployed teacher could have fifteen years (in permanent appointments) at other schools, for example. In that case, someone who has fewer years of permanent employment would have to be identified.

As was explained, the fluctuation in a school's enrolment could result in the loss of teaching posts. The education department has to work within the constraints of a limited budget. Bearing this in mind, the department will have to find innovative ways of making teachers feel more secure in their jobs. A possible solution that I would suggest is that school's ESE could be re-evaluated in a three or five year cycle. The average learner enrolment over the past three or five years could be used to calculate the ESE. Teachers would then have a sense of security for a number of years.

Furthermore, when a school has to apply rightsizing, principals should keep teachers informed of every step of the process. It was evident from the way in which



School A handled the process that this would make the process less stressful for teachers.

### 5.2.3 Stress Factor

The loss of one's job or the threat of possible change to one's status can lead to heightened stress levels. Stress, in turn, affects one's health.

Putting checks and balances in place that would assure teachers that should they would not be victimised and treated in a demeaning way by the school principal. Some of these checks and balances are that Circuit Managers should have more say in the selection process and not just accept the principal's recommendation. Most principals are genuinely open and honest when handling this matter, but in the minds of a number of teachers the principal is in a position of power which she/he may abuse especially if there are some teachers at his/her school who are at loggerheads with him/her. Just a perception that fairness will not prevail is enough to cast doubt on the whole process and even lead to prolonged court cases against the education department or expensive psychiatric and medical care for the teacher.

The recommendations for dealing with redundant teachers (PAM guidelines) underline that the needs of the school should be of paramount importance. However, these guidelines are open to interpretation and some teachers believe that some principals shamelessly manipulate them. In some cases, perceptions are seen as the truth and no amount of damage control afterwards can rectify these perceptions. One of the informants spelled out her feelings in this regard when she said that the principal could easily use the process of rightsizing to get rid of people whom she/he does not get along with. If people know that they are being treated fairly and that the process followed is transparent and is in both their and the school's best interests, it should help to soften the blow.

Persons who are identified as being in excess should be afforded the professional support to deal with the imminent change of job, site (school), or even job loss and the stress associated with it. The WCED's psychological services are already stretched to the limit in dealing with learner problems. Ideally, the education department should forge partnerships with private psychological service providers

to which teachers can be referred. People who are helped to manage the stress better will be in a better position to deal with the impact of rightsizing on their lives.

### **5.2.3 Personal and Professional Effects of Being Declared in Excess**

Principals and education authorities should acknowledge that the emotions evoked by declared in excess are real and very damaging to the health and well-being of the teachers. It not only affects them on a personal level, but also affects their professional attitudes and performance.

My recommendations with regard to rightsizing and redeployment are:

- (i) The Education Department should commission some independent research to look at all the aspects of rightsizing and redeployment.
- (ii) The Education Department should place a moratorium on rightsizing and redeployment until this research has been done and there is a better understanding of the process, and its consequences.

If the present process continues, then I suggest the following:

- (iii) Set clear guidelines that could help principals and district officials who have to deal with the process.
- (iv) Disseminate these guidelines to all stakeholders so that they are aware of the processes to be followed, their rights and responsibilities in this process.
- (v) Make the process as transparent as possible. This would allay teachers' fear of being victimised.
- (vi) Take account of the fact that married teachers cannot just be uprooted and redeployed to areas that are far away from their families.
- (vii) Train principals to handle the process of rightsizing in a professional, yet sympathetic manner.
- (viii) Accept that being declared in excess generally has a negative impact on the morale, work performance and general health of the individuals affected. Partnerships with multi-disciplinary teams (medical practitioners, psychologist, councillors, etc.) have to be forged so that the necessary support can be given to these individuals.

- (ix) If the statistics warrant doing so, warn teachers well in advance of the possibility of rightsizing. They will then not be lulled into a false sense of security, and those who want to apply for suitable posts at other schools can do this timeously. This could avoid the situation in which teachers are forced to take up a post which they consider unsuitable.

#### **5.2.4 Possible further research**

Some areas related to this topic that could benefit from further research in future include:

- How principals who have to manage the process of rightsizing are affected.
- The impact that the constant coming and going of teachers (due to rightsizing) might have on the organisational abilities of schools.
- How schools who cannot afford to employ additional teacher out of school funds cope with the loss of teachers through redeployment.
- A study of the emotions and challenges that teachers who are left behind face after their colleagues, who were declared in excess, have been redeployed.

#### **5.2.5 Summary**

Change and organisational restructuring, whether it is in the public or private sector, is a reality in every sphere of life. In order to stay relevant in an ever-changing global society, it is important that business should embrace change or risk becoming stagnant and falling by the wayside. The education sector especially has to guard against this as we are working with learners and students who have to fill their place in society as productive citizens. They need to become critical thinkers who can use their skills to compete with people from every corner of the world.

However, we have to guard against what Heystek et al. (2008:2) refer to as a “hard approach” when dealing with people. In using the hard approach, people are seen as mere resources within the organisation. Resources are physical items or possessions like furniture or vehicles that are used within the company to achieve a required outcome. The inanimate nature of resources means that they can be moved, sold or disposed of. Human resource management theory equates people

with resources that can be moved around within the organisation to achieve certain outcomes. Rightsizing is in line with this notion that humans, in the case of this study teachers, can be moved around like objects to restructure and streamline the education system.

In cases where rightsizing and redeployment are applied to human beings, the “soft approach” should be used. This takes account of the fact that human beings have feelings and emotions and are “influenced by relationships, motivation, communication, conflict and change” (Heystek, 2008:2). We need to acknowledge the negative effects of organisational change on people, and help those who have to manage change, specifically rightsizing, to do it in a more compassionate manner.

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## Appendices

### Interview Questions

#### Teachers

1. **How long have you been in the teaching profession?** (years' experience) / Hoe lank is u in die onderwys (jare ondervinding)?
2. **Where do you have the most experience (FP, IP or SP)? How many years?** / In watter fase (GSF, IF of SF) het u die meeste ondervinding? Hoeveel jaar
3. **What is the highest qualification that you have?** / Wat is u hoogste kwalifikasie?
4. **When (what year) were you declared in excess? At what school?** / In watter jaar was u oortollig verklaar? By watter skool?
5. **How did you hear that the school was about to declare some teachers in excess? (staff meeting, one on one, etc.)** / Op watter wyse het u verneem dat van die personeel op die skool oortollig verklaar sou word?
6. **When did you find out for the first time that you were the one chosen to be declared in excess?** / Wanneer het u vir die eerste kee uitgevind dat u die persoon is wat oortollig verklaar is?
7. **How did you get this information (verbally by principal, rumours, written notice)** / Op watter wyse het u die inligting gekry? (mondelings, gerugte, skriftelike kennisgewing)
8. **How did you feel when you heard that you would be declared in excess?** / Hoe het u gevoel toe u verneem dat u oortollig verklaar is?
9. **Did this news affect you on a.....**
  - (i) **Professional**
  - (ii) **Personal level? How?**  
Het die nuus u geaffekteer...
    - (i) op professionele vlak
    - (ii) op ,n persoonlike vlak? Hoe?
10. **How do you feel about the process followed (fair and transparent)?** / Hoe voel u oor die proses wat gevolg was om u oortollig te verklaar (regverdig)?
11. **Were you placed at a school of your choice?** / Was u na ,n skool van u keuse verplaas?
12. **Did the school / WCED provide any form of support, counselling, etc (If yes, in what way)?** / Het die skool / WKOD enige ondersteuning of berading voorsien (Indien ja, in watter vorm)?
13. **Describe your feelings / emotions at this stage regarding redeployment / being declared in excess.** Beskryf u emosies t.o.v. oortollig verklaar word / herontplooiing
14. **Do you think that the process could be open to abuse by those in power? Elaborate.** Dink u dat daar ruimte is in die proses vir diegene in mag om hul mag te misbruik?

Principals

- 1. By when did the school learn that it was going to lose some teachers' posts?**  
Teen wanneer hat u geweet dat u skool van sy onderwysers sou verloor?
- 2. Did you have any set criteria to identify who was going to be declared in excess? Was it criteria set by the WCED or by the SGB?**  
Het u enige kriteria gehad wat gebruik was om onderwyser(s) oortollig te verklaar? Indien wel, was die kriteria deur WKOD of the Beheerliggaam opgestel.
- 3. What were the main criteria used when the teacher(s) were identified to be declared in excess at your school?**  
Wat was die hoofkriteria wat gebruik is om onderwysers te identifiseer?
- 4. Are there guidelines in place (by WCED) to help principals deal with the process of rightsizing and redeployment?**  
Het die onderwysdepartement riglyne daargestel waarvolgens prinsipale en beheerliggame moes werk om onderwysers te identifiseer?
- 5. How long did you (the school) have to put plans in place to counter the loss?**  
Hoe lank het u gehad om planne in plek te sit om die verlies te absorbeer?
- 6. How were the teachers informed that the number of teachers at the school is above the staff establishment and that rightsizing and redeployment will have to take place?**  
Hoe het u die personeel ingelig dat onderwysers oortollig was en dat van hulle uitgeplaas sal moet word na ander skole?
- 7. How do you think the teachers handled the news that one or more of them would be declared in excess?**  
Hoe dink u het onderwysers die nuus hanteer?
- 8. Were any measures put in place to offset the impact / help teachers deal with the possible impact of the news (no. 7)?**  
Was onderwyser op enige manier bygestaan tydens die proses om die impak te versag? (nr. 7)
- 9. Some teachers feel that principals could abuse their powers to settle a score. How would you respond to such accusations?**  
Sommige onderwysers voel dat prinsipale hul 'mag' kan gebruik om van diegene onslae te raak wat hulle nie oor die weg mee kom nie. Hoe sal u op die antuiging reageer?
- 10. How do you think being declared in excess affects a teacher?**  
Hoe dink u affekteer die proses (onderwysers wat oortollig verklaar word en herontplooiing) onderwysers?
- 11. Can you think of examples where you could see a change in a person's health and/or professional attitude after being declared in excess?**  
Kan u aan 'n voorbeels dink oor hoe die gesondheid en/of professionele houding van onderwyser(s) verander het nadat hulle oortollig verklaar is?