

teacher centres (as is the case in Mexico through the Institute for Assessment and Innovation of Education (INEVAL), should be considered.

Greater use of distance education and information communication technology (ICT) be promoted in the delivery of teacher education and professional development.

The applications of competency examinations to assess teacher trainees' potential to become good teachers be explored in all teacher education programmes in SA.

It is important that teachers are unambiguously committed to the profession thus signalling a willingness to remain in the profession. This is critical to addressing the education quality challenge, which requires committed, qualified, competent and effective educators at all levels of the system. One way of facilitating this is to have high entry-level qualifications for joining the teaching profession.

Teacher training should be aligned with the content for the utilization of the 80 hours set aside for professional development. All educators have opportunities to attend training workshops for a certain number of days during school holidays to keep them abreast of the latest curriculum, HR and IT developments. The DoE should provide guidelines to provinces in this regard.

Performance management, promotions and career pathing

Consideration should be given to linking educators' performance with learner achievement. This is regarded as key to improving the quality of teaching and learning and constitutes one of several teacher assessment factors in Cuba and Mexico.

Performance management should be made fundamental at all levels of the education system. This should include performance evaluation measure for educators as well as school managers.

Commissioning/establishing an independent education evaluation centre that monitors and evaluates the health of the education system, including the performance of teachers;

The practice of "Opening the Doors of the Classroom" which allows parents, during a designated week, to visit schools and observe teachers teaching a lesson to their children should be promoted. Overall, a greater community role, especially by parents, in supporting and encouraging teachers to perform optimally, is recommended.

Performance rewards/incentives should be provided for all teachers, with specified criteria.

Career pathing in Jamaica and Mexico provides for progression from teacher, to senior teacher to master teachers. The creation of a non-professional category of educators to teach where professional educators are not willing to teach may be considered.



Employee relations and conditions of service

Key lessons relating to employee relations that could benefit educators' contribution to quality education include:

- Greater emphasis on educators' social commitment to the profession, including a strong work ethic. Teacher unions should take the lead in fostering a cooperative and non-antagonistic relationship in the provision of quality public education; and
- Instituting a more compact, time and output-based collective bargaining and negotiations process. For example, it could be specified that all negotiations be concluded within 1 month, with the option to extend negotiations for a maximum period of 1 week. Thereafter, the negotiating parties may opt for appropriate action within the labour legislation guidelines to force a resolution.

It is further proposed that the overall service packages for teachers be strengthened by considering the following possibilities:

- Special housing allowances for teachers based in rural schools;
- A teacher transport allowance for educators who have to commute long distances;
- More attractive study leave benefits;
- Increasing government's pension contribution;
- Increasing government's medical aid contribution or making it more responsive to teachers suffering with HIV/Aids and other chronic diseases; and
- Introducing government cover for funeral/ burial costs of educators in poor communities.

EMIS

It is recommended that the Department of Education establish an integrated education data-base with information on educators that could be accessed by a range of stakeholders, particularly school management, teachers and organizations such as the ELRC and SACE. As reported in the study on Factors Determining Educator Supply and Demand (2005), the methods of collecting and managing EMIS data need careful evaluation to assess their effectiveness.

Further, that the DoE consider:

- Expanding its EMIS department to include research and policy components to enhance overall policy formulation and implementation with regard to public educators;
- The development of an EMIS master plan;
- The establishment of a Centre of Educational Technologies to strengthen the use of information technologies throughout the education system; and
- The development of both macro- and micro- (school-based) indicators to monitor and evaluate the performance of the education system; and
- The organization of a 'technical' visit to SA by a team of EMIS experts, for example, from the Mexican EMIS department to strengthen the development of SA's own Education Management Information System.

Issues for further investigation

It is in the nature of international study visits that, due to time constraints and other factors, there remains a need for follow-up work to obtain clarity and more details on certain aspects of the project. This was especially the case in this series of study visit given the large number of countries visited and the short duration of visits in respect of some of the countries.

In light of the above, it is recommended that:

The ELRC maintain ongoing relations with a number of the education ministries, departments of education and teacher unions, firstly, to ensure that greater clarity is obtained on a number of policies pertaining to public educators and their effects on improving education quality, and, secondly, to help consolidate professional relationships for the future.



INTRODUCTION**1.1 Introduction**

Two of the biggest socio-economic challenges facing South Africa are the elimination of poverty and tackling unemployment. Improving the quality of education is critical to meeting these challenges. An important dimension to improving education quality is to ensure that public educators work in an environment that is conducive to effective learning and teaching. This implies that, among other considerations, it is imperative that the conditions of service for public educators are of the highest possible standards.

The Education Labour Relations Council (ELRC) of South Africa has been at the forefront of formulating policies and engendering practices to improve the conditions of service for public educators, and hence contribute to improving the quality of education. In reflecting on the impact of policies developed over the past decade, the ELRC identified the need to develop policies that were achievable and implementable. With this in mind, the Council decided to undertake a number of country study visits with a view to familiarizing itself with 'best practice' on a range of education policy challenges.

In 2005, the ELRC prepared a proposal for utilizing its current Medium Term Expenditure Framework (MTEF) allocation for the period 2005 to 2008. A number of key policy development areas were identified to enable educators to enhance education quality, including improved career pathing opportunities; performance rewards; teacher incentives; social support and counselling services; retraining teachers for Maths and Science, and improving HR management capacity. In reviewing current policies and practices, it had become apparent that local solutions and innovations were inadequate, and that there was a need to capitalize on international experience and expertise to give fresh impetus to engaging with the issues to be addressed. This led to the decision to undertake an international study visit to engage in consultations and learn from international experience with regard to specific educator-related issues that are likely to impact on the improvement of education quality in the country.

1.2 The study's aim and objectives

The overriding aim of the project was to enhance the formulation of evidence-based policies within the ELRC with specific reference to improving the conditions of employment for public educators, resulting in teaching that makes a difference to the delivery of quality education in SA.



The specific objectives were:

- To derive lessons from different country experiences in enhancing policy implementation and practice with regard to the difficulties and challenges confronting South Africa;
- To gather and share relevant information through site-visits, observations and interviews with education ministry, departmental and teacher union officials of the selected countries;
- To extract policy and education quality implications that were applicable to South Africa; and
- To build research and policy expertise of key role players within the ELRC.

1.3 Rationale and scope of the project

The main focus of the project was to access ideas and processes from cognate country contexts that could be adapted to the South African situation. Thirteen countries were selected for the study visits. These were Botswana, Cameroon, Ghana, Tanzania/Zanzibar, Togo and Zimbabwe in Africa, Cuba, Jamaica and Mexico in Central America, Brazil and Chile in South America, and India and Thailand in Asia. The countries were selected mainly because of similarities with the South African education system and the potential for learning from their education practices. For example, it was felt that much could be learnt about education decentralization practices by studying Brazil's entrenched system of Municipal Education departments, and visiting the largely rural Mexican state of Chiapas could shed light on the challenges of rural education. Moreover, many of these countries face equally tough challenges in developing and sustaining a quality education system. Besides learning from the host countries, it was hoped that South Africa could in turn share its experiences to the benefit of these countries.

Based on the collective inputs from the ELRC, the DoE and teacher unions, four major themes were identified for investigation. These were:

- Challenges relating to policy making and implementation processes;
- Human resources management of public educators, with a focus on teacher provisioning, performance management of teachers, teacher education and professional development, and teacher employment and deployment;
- Educator information management systems to enable proper planning; and
- Employee relations/, specifically salaries, conditions of service, career pathing and teacher incentives.

1.4 Research design

The research design comprised the following phases:

1. **Development of the project proposal:** This involved consultations between the HSRC and the ELRC Project Task Team, as well as consultations with the General Secretary of the ELRC and the Deputy Director-General: Systems and Planning Branch of the DoE;
2. **Development of a data collection instrument,** based on the focus areas outlined above. This took the form of a semi-structured questionnaire. The instrument served a dual purpose: as a conventional data collection instrument and as a capacity building tool, wherein all delegates of the respective delegations were assigned the responsibility of gathering information on a specific focus area, for example, education policy processes. It should be noted that as a result of the specific persons interviewed and discussions held, it was not possible to gather information in relation to all questions. Hence answers/information to some questions had not been obtained. This is referred to in the introductory paragraphs to chapters Two, Three and Four.
3. **Compilation of country information-packs** to orientate delegates on the education systems and socio-economic challenges of the respective countries before departure;
4. **Pre-departure briefing of delegates,** including overview of visit itinerary, use of data collection instrument and guidelines for compilation of team reports;
5. **Country site-visits** (education ministry and department offices, educational institutions and teacher unions) and interviews (using the data collection instrument) with education ministry, department and teacher union officials;
6. **Drafting of country reports** by the respective delegations and writing up of integrated report.

1.5 Context

The quest for the improvement of education quality is recognised as the most critical challenge facing most countries. In South Africa, improvement in education quality has been the central focus of the new government since its inception in 1994. The Minister of Education, Hon. Mrs Naledi Pandor, recently noted that "Improving the quality of education in South Africa is a national priority that requires involvement and engagement throughout all levels of our society" (August 2005). Significant amounts of resources have been invested, in addition to the array of policies, intervention programs and projects implemented, to ensure the provision of quality education for all. However, it is evident that a number of serious challenges need to be addressed, including school infrastructure, teacher development, school governance and community participation, service delivery and monitoring, and language policy issues, as well as the need to take cognizance of socio-economic challenges around poverty, HIV/Aids, affordability of school fees and violence and abuse. A key challenge in rising to this multi-faceted challenge is the role of public educators.



Several studies have been conducted in recent years to highlight the challenges relating to the role of public educators in driving education quality interventions, such as the Educator Workload in South Africa study (Chisholm et al, 2005) and Workplace Policies in Public Education (Simbayi et al, 2005) both funded by the ELRC. There has also been numerous policy development initiatives aimed at enhancing teacher capacity and effectiveness in the classroom, notably the Framework Report on Teacher Education and Development (DoE, 2005). Moreover, a number of ELRC collective agreements have sought to concretize policies for public educators and to promote their implementation, such as that dealing with the Improved Career Pathing for Qualified Post Level 1 Educators.¹

The main focus of the "Workplace Policies in Public Education" study was to review HIV/Aids and workplace policies that have been developed by the DoE and their implementation in the public school system in SA, as part of a multi-study project on *Factors Determining Educator Supply and Demand in South African Public Schools*.

Several of the policies reviewed are of relevance to this study. These include:

- the Employment of Educators Act 76 of 1998, which provide a regulatory framework for employment, conditions of services, appointment, promotions, transfers, and procedures for termination of services;
- the Personnel Administrative Measures (PAM) policy, which deals with crucial personnel issues such as rank codes for Personnel Salary System (PERSAL) purposes, examination duties and remuneration, secondments, leave, time off, workload of educators, and development appraisal procedures and instruments;
- Norms and Standards for Educators, which sets out the required training and competencies for educators at various levels in the education system. It identifies seven roles that an educator must perform, such as being mediators of learning; interpreters and designers of learning programmes and materials; leaders; managers; lifelong learners; researchers, as well as community and citizenship roles; and
- Workplace Policy for HIV/AIDS, aimed at providing guidelines for all employees on how to manage HIV/AIDS in the workplace. Its main objectives are to create a supportive work environment for employees living with and affected by HIV/AIDS, to eliminate discrimination against persons living with HIV/AIDS, inform employees about their rights, and protect persons potentially exposed to HIV while at work.

The study made several important recommendations concerning policy implementation, including: Making a more accurate assessment of resources needs for the implementation

¹ ELRC Collective Agreement Number 5 of 2006.

