"An overall pattern of dissatisfaction"?

Interviews with primary school teachers on motivation, experience and recruitment

John Kruger, Dumisani Hompashe & Lunga Swelindawo
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Teacher Demographic Dividend.

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"AN OVERALL PATTERN OF DISSATISFACTION"?
INTERVIEWS WITH PRIMARY SCHOOL TEACHERS ON MOTIVATION, EXPERIENCE AND RECRUITMENT

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For Resep's TEACHER DEMOGRAPHIC DIVIDEND STUDY

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"Modern education systems evolve in a context of growing teacher shortages, frequent turnover and a low attractiveness of the profession. In such a context where these challenges interrelate, there is an urgent need to better understand the well-being of teachers and its implications on the teaching and learning nexus."

(Viac and Fraser 2020, 4)

"Teachers are successful when teacher policies are designed and implemented in a manner that attracts high-ability individuals, and prepares, supports and motivates them to become high-performing teachers. A handful of countries, such as Finland, Japan and Singapore, boast a cadre of successful teachers. In most other countries - low-income, middle-income and high-income alike - teacher policies are either ineffective or lack internal consistency."

(Beteille and Evans 2019, 2)

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"AN OVERALL PATTERN OF DISSATISFACTION"?

## INTERVIEWS WITH PRIMARY SCHOOL TEACHERS ON MOTIVATIONS, EXPERIENCE AND RECRUITMENT

1. Introduction

Background

The South African teacher workforce is ageing and over the next decade the school system will face increased attrition from retirements. This teacher demographic shift presents risks and opportunities. The risk is that there will not be enough newly trained and joining teachers to fill the places of retirees, with negative implications for the quality of teaching and learning. The potential dividend is that teaching positions will be available to a potentially younger, better trained and idealistic cohort of teachers. The new cohort will also be less expensive than older teachers, reducing cost pressure in the sector and providing the potential for increased investment in the quality of education by, for example, reducing class sizes or increasing complementary inputs.

To support government planning for the teacher demographic shift, Resep is conducting a three-year research project on how many teachers South Africa will require over the next 30 years and what can be done to ensure that there are sufficient, appropriately qualified teachers for all classrooms going forward.

Figure 1: Providing Teachers for Learning – Elements of the Challenge
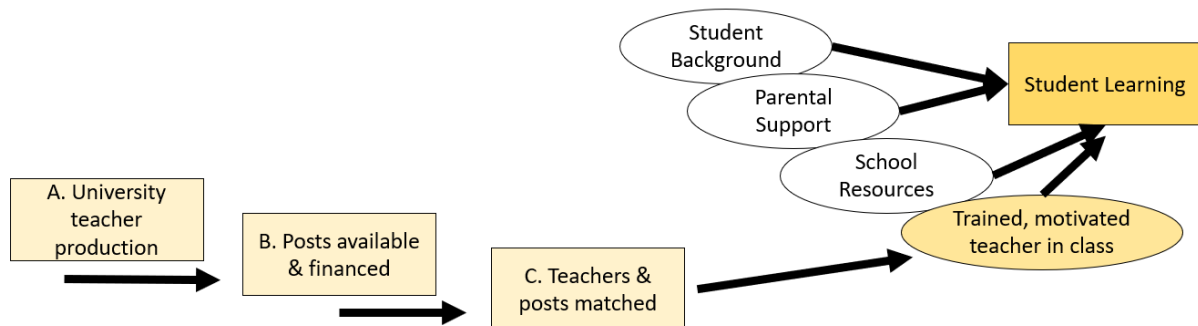
Source: Authors' own based on a range of analyses, including Christian and Sayed 2023, Deacon 2010 and Sinclair 2008.

The overall challenge of having enough teachers in classrooms encompasses at least three sub-challenges. Figure 1 illustrates these three elements which are necessary to effectively staff classrooms for learning. These elements are:

- **Teacher training**, that is, whether enough school leavers will apply to study teaching, and universities will be able to produce adequate numbers;

- **Prioritising and financing of staffing**, namely whether provincial education departments will prioritise and have the funding available to replace retiring teachers in a context of shrinking real education budgets as well as governance/corruption risks; and

- **Recruitment and retention**, whether, given the overall economic and labour market conditions and relative amenities of teaching positions, it will be possible to attract, retain, and keep the next generation of teachers motivated.

Current evidence is that the **production of teachers** has expanded significantly over the last decade, and that in aggregate universities are now producing adequate numbers of teacher graduates annually to cope with the expanded demand due to rising retirements. Currently, more teachers are produced annually than are joining provincial education departments, and the number of teacher graduates has increased from around 9,000 in 2010 to just above 30,000 in 2021 (Gustafsson 2022b, 35; Böhmer and Pampallis 2022, 1). The composition of the teacher output is, however, not optimal as fewer primary school teachers are being produced compared to demand estimates while the number of secondary school teachers produced is double the demand estimates (Gustafsson 2023a, 2)

An important constraint to employing adequate numbers of teachers, as retirements accelerate, is the actual employment behaviour of provincial education departments. Ongoing **national budget pressure**, resulting from slow economic growth and rising debt and debt costs, has led to reduced real per capita education budgets and a failure to fully replace departing teachers and school managers. This has pushed up pupil-teacher ratios and class sizes to concerning levels (Gustafsson 2023b, 13). Current indications are that budget pressures will continue and even worsen, and the available education funding will shrink further in real per capita terms. [1]

The third potential obstacle to filling teacher positions relates to the **ability to recruit the right number of quality teachers, retain them, and keep them motivated/effective**. The number of trained teachers that will be available can be seen as determined by the job ambitions of school leavers, the capacity of training institutions and the preferences of teaching graduates, on the one hand, and the amenities and conditions of teaching compared to other employment opportunities, on the other. How many and who are in front of classes will also depend on the effectiveness of recruitment processes, which will be influenced, among other things, by information availability (both about the profession in general and specific teaching opportunities) and various costs to candidates related to the employment process.

This study is motivated by the need to include teacher voices in assessing employment challenges in education in South Africa. As Viac and Fraser indicate in the quotation on the title page, challenges in teacher provisioning necessitate a much better understanding of teacher well-being and its driving factors. This was acknowledged for some time in the planning documents of the Department of Basic Education.

Therefore, this study explores several aspects of teacher well-being, including teachers' job aspirations, workplace experiences, and career intentions. Furthermore, issues related to recruitment and retention were considered. The approach in each case is to briefly review previous findings in South Africa and then report the findings from interviews with 27 teachers

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[1] For South Africa, already in the early 2000's, Crouch speaks of the demand for teachers being "bureaucratically or budgetarily restricted" (Crouch 2001, 2). Bennell (2022) argues that despite reports of acute teacher shortage due to high attrition rates in Sub-Saharan Africa, he anticipates a rising "teacher unemployment crisis" across the region because of inability to employ additional teachers produced by training institutions. Constrained fiscal capacity and lack of political commitment are blamed for this developing situation (Bennell 2022, 3 and 16).

and nine principals in quintile-three primary schools in three South African provinces: the Eastern Cape, Gauteng, and Limpopo.

In the fieldwork, the focus was on primary schools, which are crucial to building learning foundations and where class size is a significant and growing challenge. Province and school selections were purposeful with consideration of convenience and cost. In terms of purpose, diverse provinces were included, but within these, the focus was on quintile three schools in or close to urban centres. A mixture of smaller and larger schools was selected from provincial databases. This resulted in interviews at nine schools around East London in the Eastern Cape, Johannesburg in Gauteng, and Polokwane in Limpopo. Schools were requested to select the three teachers and to include some recently qualified teachers and foundation-phase teachers. Ethical approval for the study and the interviews was granted by the Research Ethics Committee of the University of Stellenbosch. Approval for the study was granted by the relevant provincial authorities and individual teachers, and principals individually consented to being interviewed, and for interviews to be recorded on the condition of confidentiality. The annexure provides more information on the selection and profiles of schools and teachers. Interviews were transcribed, and feedback on various areas and issues was tabulated and analysed.

Approach to teacher motivation and interview instruments

There is an extensive international literature on teacher aspirations and motivations as well as on teacher recruitment. Typical of the literature on what attracts to and retains in the education profession is Sinclair (2008). She builds on the distinction between "extrinsic motivation", defined as factors "external to the person and [with] reference more to the job" and "intrinsic motivation" or factors related to the person and her/his life. Figure 2 summarises sets of relevant motivation factors identified in Sinclair 2008 (81 and Appendix 1).

Figure 2: Being a teacher - motivation, retention factors and obstacles
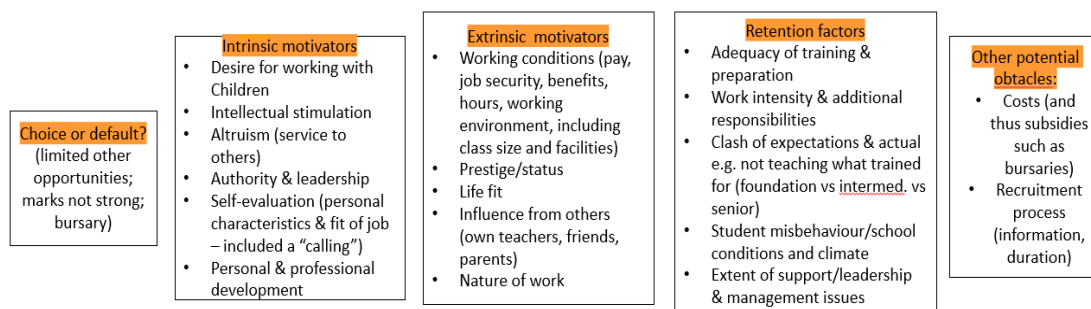
Source: Author's own based on Sinclair (2008)

This casting of the discussion in terms of extrinsic and extrinsic motivation is also commonly followed in South African literature. In some cases "altruistic motivation" or a "wish to contribute to society" is added (Deacon 2015a, 12; Christian and Sayed 2023, 165). Such altruistic motivation, which can be defined as "relat[ing] to the desire to do good," can be seen as a sub-component of intrinsic motivation (Sayed and McDonald 2017, 3).

This framework was used to develop the interview instruments and is also the frame used in Sections 2 and 3 to discuss South African evidence and findings related to motivation and

retention from school interviews[2]. The instruments for teachers and principals are included in the annexure.

There is also a large international literature on teacher recruitment, which, as is to be expected, overlaps with the literature on motivation and retention because effective recruitment needs to harness (exploit/use) the various motivational factors. An example is that of Evans and Mendez Acosta (2023). They identify material benefits, professional benefits, improved information and "behavioral nudges" as ways of recruiting staff for schools struggling to attract quality staff, because of location and/or school conditions.

Beyond the regulatory framework, South African literature on teacher recruitment is not extensive. One example is Deacon (2016, 16–17), who discussed the effectiveness of teacher recruitment within the broader context of the initial teacher training system. Recruitment issues also surface in studies on the politics and political economy of the South African education system, such as Levy et al. (2018, 224), Gustafsson and Taylor (2022, 33, 67), and Meny-Gibert (2022). There are isolated studies of appointment processes in specific provinces, such as Diko and Letseka (2009, 231–32) on inefficiencies in the North West Province.

Full justice cannot be done to this literature, but in Section 4, some of the conclusions are identified against the background of the regulatory framework and current practices with regard to appointments.

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[2] Further interrogation of approaches to teacher occupational choice could be useful, also because the literature on teacher motivation, as represented by the international and South Africa studies referred to above, engage only weakly with potential foundational literatures. Richardson and Watt (2006, 31) distinguish motivation-relevant "teacher education literature" and the "broad career choice literature" but then develop a "Factors Influencing Teaching Choice" or FIT-Choice framework for which they build on a long-standing approach to achievement related choices in psychology, namely "expectancy-value theory" [".. achievement-related choices are motivated by a combination of people's expectations of success and subjective task values in particular domains" (Leaper 2011)] . Other approaches are also relevant. One is Akerlof and Kranton's "Identity Economics" showing that decisions are impacted not only by "basic" individual preferences or tastes, but also by social identity which is shaped by social norms and expectations (see Akerlof and Kranton 2005). There are, however, also several other relevant literatures identified by, for example, Ginzberg et al. (1950) and Fullard (2023). Also relevant is the more policy/strategy-oriented literature on recruitment of which Beteille and Evans (quoted on the title page) is an example.

2. Aspirations and motivations to teach

The initial part of interviews with teachers focused on career aspirations and motivation to enter the teaching profession. In South Africa, there has been no ongoing monitoring of aspirations with regard to teaching or teacher motivation and experience, a situation that is bound to improve with the country having started to participate in the Organization of Economic Cooperation and Development's (OECDs) Teaching and Learning International Survey (TALIS) in 2018.[3] The 2018 data for South Africa have not been intensively analysed, but overviews are available (OECD 2019a, 2019b, 2019d), and some work is underway at Resep.

Teaching aspirations and motivations received attention in the aftermath of staff rationalization in the mid-to-late 1990s. The period also saw growing concerns about the impact of the HIV/Aids epidemic on teachers and about the quality of teaching, heightening the interest in teacher motivation and the broader issue of teacher supply and demand (see Chisholm 2009, 19 & 21). This section identifies some of the findings of this literature on South Africa and discusses the findings from the teacher interviews.

Previous findings for South Africa on aspirations to teach

In addition to incidental studies on learners' aspirations and motivation to teach[4], three relevant streams of research can be identified in this area. The first stream, a component of the *Teacher Education Programme* of the Human Sciences Research Council (HSRC), mostly by Michael Cosser, focused on learner and student interests and outcomes in studying teaching. The empirical analysis was based on a nationally representative cohort of learners in Grade 12 in 2005 (Cosser 2008; 2009; Cosser and Selola 2009). Following on this, and associated with Joint Education Trust's (JET) *Initial Teacher Education Research Project*, Roger Deacon dealt with some of the issues of recruitment and retention within a broader framework focused on the adequacy of the initial teacher education (ITE) system, which included a set of surveys of final year student-teachers and new teaching graduates (Deacon 2010; 2014; 2016). Most recently, the *Centre for International Teacher Education* (CITE) at the Cape Peninsula University of Technology (CPUT), used longitudinal data from questionnaires and focus groups with teaching students at four universities to analyse decision-making behind becoming a teacher (Sayed and McDonald 2017; Sayed et al. 2018) and also reported case studies on career pathways and on motivation to teach in challenging schools in the Western Cape (Sayed and De Kock 2019; Christian and Sayed 2023).

In 2010, Deacon concluded that the "public image of the teaching profession" in South Africa was poor. This poor image, together with low morale, Deacon argued, made "it difficult to recruit sufficient numbers of quality new teachers" (Deacon 2010, 41). His conclusion was built on, among other sources, Cosser's (2009) work on the aspirations of grade 12 learners[5]. The study found that, while only 3 per cent of learners aspired to study teaching, 11.5 per cent aspired to study health sciences, 16,0 per cent computer science, 17.9 per cent engineering and

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[3] "South Africa's entry in 2017 into the international TALIS programme, aimed at monitoring what teachers themselves say is needed, was an important milestone" (South Africa, Department of Basic Education 2020, 13).
[4] See Deacon (2014, 11–13) for a review of some international and South African studies. There seem to be hardly any recent additions to the South African literature, except for those of the Centre for International Teacher Education (CITE) referred to in the text.
[5] The core data came from questionnaires administered by school teachers and completed by 20,659 learners in six provinces and from focus groups in two schools where the original questionnaire was administered.

22.4 per cent business and commerce (Cosser 2009, tbl. 5.24). The data are read as indicating that "teaching remains low on the professional agenda of school-leavers", especially for African students, and he refers to "low aspiration for enrolment in education programmes" (Cosser 2009, xv).

The more recent evidence from TALIS 2018 seems to confirm this low preference for teaching relative to other careers and that teaching may for many be a "default" option, rather than a positive choice. [6] In the survey, respondents indicated whether teaching was their first career choice (OECD 2018, 6). On average, for the OECD, teaching was the first-choice career of 67 per cent of teachers. In South Africa this proportion was 49 per cent which, as the OECD points out, "is the lowest share of teachers among all countries and economies participating in TALIS" (OECD 2019d, 45; 2019b, 16; 2019c, tbl. I.4.4). Sayed et al. (2018, 47) found that for 51.6 per cent of 258 Bachelor of Education (B.Ed.) Foundation Phase students, teaching was the first career choice, but this was the case for only 22.6 per cent of the 65 Postgraduate Certificate in Education (PGCE) students.

This evidence on the preference to study teaching relative to other occupations is not necessarily contradicted by the growing enrolment in, and graduation from, teaching courses at universities.[7] As indicated earlier, the annual number of teacher graduates tripled between 2010 and 2021. The expansion was much more rapid than for enrolments in all degree programmes, which increased by only 40 per cent over the same period. As is evidenced by the TALIS data and also indicated by some of the interviews for this study, a substantial proportion of teachers end up in the profession because there are obstacles to pursuing their most preferred career. Therefore, increasing numbers pursuing teaching need not point to changing preferences for and views on the teaching profession (relative to the evidence above), but most likely result from a range of obstacles facing students in pursuing their preferred careers.[8] In this regard, the expansion of the Funza Lushaka bursaries for education students would also have been expected to increase the popularity of teaching as a study area relative to other fields of study because it reduces the relative cost of studying education.

Previous findings on motivation to teach

Sinclair (2008, 81) reflects the consensus on international evidence, reporting that for student teachers, the research finds that the love of working with learners, aspiration to serve, and perceived benefits of the job are the most commonly reported motivation factors. These drivers are, however, also found to be the dominant drivers with people already teaching, and not

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[6] Ball and Goodson (2002, 20) identify three primary types of teacher commitment: "vocational, professional and career continuance". In the case of career continuance, individuals study teaching as a second-best alternative or "a lack of viable alternatives" and continue along the trajectory through a set of "non-decisions" or "inertia".

[7] See also Böhmer and Pampallis (2022, 1). The increase started from the late 2000s: "A concerted teacher recruitment campaign, utilising various media, has been under way since 2008, with R1.6 million allocated to it in 2008/09 and R450 000 in 2009/10. In conjunction with the Funza Lushaka Bursary Scheme, the campaign may have stimulated interest in teaching as a career, with all institutions reporting a 50–100 per cent increase in applications for initial teacher education programmes in 2009 as compared to 2008. Certainly, the number of first-time enrolments in initial teacher education programmes has recently exhibited a significant spurt, of 37.1 per cent, from 11 855 students in 2008 to 16 257 in 2009 ". (South Africa, Department of Basic Education and South Africa, Department of Higher Education and Training 2011a, 39)

[8] Bennell (2022, 12) argues that low attrition rates of teachers in Sub-Sharan Africa need not point to job satisfaction but may be explained by teachers having "nowhere [else] to go", for example, "primary school teachers have very limited alternative employment opportunities, and are obliged, therefore, to remain in their jobs." Similarly, a proportion of school leavers may have "nowhere else to go" but to teaching.

varying with personal characteristics such as length of time teaching, socio-economic background, achievement levels, gender, and ethnic background. There was an exception to the consistency of drivers across teaching students and practising teachers with different backgrounds and characteristics. The exception is that practising teachers are more likely to reference "a calling" to teaching as motivator. (Sinclair 2008, 81)[9]

For South Africa, Deacon (2015a, 12) concluded that earlier research in South Africa identified extrinsic factors, with teaching opening up opportunities for further studies or serving as a gateway to other careers specifically mentioned as more important than intrinsic and altruistic motives. These findings contrast with the international findings for high-income countries. However, the results of his survey of final-year teaching students in 2013 were more in line with international findings: the top four reasons for becoming teachers, identified by the proportion of respondents agreeing or agreeing strongly with statements, are altruistic and/or intrinsic. The top four statements were as follows:

• "Help improve the quality of education in South Africa" (90.2 per cent)

• "Share my knowledge and enjoyment of a subject" (89.0 per cent)

• "Help make a difference" (88.2 per cent)

• "Like working with children" (85.1 per cent). (Deacon 2015a, 33)

In contrast to the strong support for intrinsic motivation, "extrinsic reasons combined with intrinsic elements" such as "wanting 'to work in a respected profession'" and taking "a step to further study" received "moderate to strong support." "Clearly extrinsic reasons" related, for example, to job security and amenities of the occupation, attracted only "average support" (ibid). Sayed et al. (2018, 66) also find that "teaching as a form of civic duty and of helping society emerged as a strong motivator to becoming a teacher, compared to all the other reasons." They, however, advise "caution … interpreting the data" as the highlighting of altruistic type motivations could be "merely reflecting what [is] considered to be positive messaging about becoming teachers as invoked by the institutions and society in general …".

In investigating teacher motivations, TALIS asked teacher respondents to rate several statements about the teaching profession with regard to the importance of the statement in becoming teachers. These statements cover extrinsic factors ("a steady career path", "a reliable income", "a secure job"), and intrinsic/altruistic motivators (among others, an ability to impact the development of children and "making a contribution to society"). Statements are rated on a scale of 1 to 4 ("of no importance" to "of high importance"). (OECD 2018, 6)

In TALIS 2018, a very high proportion of teachers across all OECD countries rated the opportunity to "influence the development of children and young people" (92 per cent) and "to provide a contribution to society" (88 per cent) to be major factors in them becoming teachers. A much smaller percentage (60 to 70 per cent) rate extrinsic drivers (remuneration and working conditions) as major motivators (OECD 2019c, tbl. I.4.1). The South African responses show

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[9] From England: "Researchers have begun to focus on the careers (subjective and objective) of teachers and to examine more closely their motivations, experiences and strategies as workers in the education system. Some analyses present a conception of teachers' careers in purely materialistic terms, teachers are seen as individual agents competing for personal advancement and promotion … , others trade on an 'idealist' view, seeing all teachers as altruistic missionaries, neither is adequate." (Ball and Goodson 2002, 7)

an even higher proportion of teachers (98 per cent and 97 per cent) rating altruism (influencing children and contributing to society) as the principal reason for joining the profession. A very high proportion of South African teachers (80 per cent to 90 per cent) compared to the overall OECD average (60 per cent to 71 per cent) also saw material and work environment as major factors (OECD 2019c, tbl. I.4.1)

Interviews

In the TDD school interviews, 11 out of 27 teachers interviewed, and thus well below the 49 per cent of South African teachers as found in TALIS 2018, indicated that teaching was their first choice of career. Fourteen teachers indicated that education was not their first choice of career and in two cases it was not clear what the first-choice career was.

Not all teachers for whom education was not the first choice indicated what their first choice of career was. Among those that did indicate preferred careers outside education, these encompassed a fairly narrow range. As a first choice, seven aspired to positions in health (ranging across nursing, psychology and medicine) and two to business and finance, another two preferred law and one desired to be a traffic officer.

Four of the fourteen teachers who would rather have studied something else pointed to parental persuasion as the factor that led them away from their first choice. Sometimes this was because of the perceived greater job security in teaching. Another four of the teachers pointed to finances as the reason for studying their second option, education. In some cases, teaching was seen as a more affordable option. More recently, the Funza Lushaka Bursary scheme has become more important in decisions to register for teaching.

Three teachers were not accepted, or accepted late, into their preferred study direction, while distance from the study centre or the need to study from home (which could also reflect cost or financial considerations) kept two students from their preferred career. One interviewee indicated that information about the route to becoming a teacher was more easily available than information about the preferred career.

In several cases, where teaching was the second or default option, strong commitments to teaching developed. In one case, this was related to contact with learners during practical teaching, and specifically, the need to make an impression on the learners. This teacher also related how her teacher inspired her. Another teacher referred to being drawn in by the children, and among some younger teachers, a strong sense of sympathy with the children was observed based on an acute understanding of the social context, personality, and potential of learners.

Among teachers for whom teaching was the first-choice career, intrinsic and altruistic motivations were expressed most often. Respondents referred to their love of children, their concern for the children, their passion for teaching, and as was common in TALIS 2018 as well, to teaching as "a calling." Two of the "first-choice" teachers also referred to what could be thought of as aptitude, namely, understanding the curriculum well at school and early on being drawn into supporting fellow scholars. In several cases, having good role models (their own teachers or teaching parents) was given as a reason for choosing a teaching career.

In the two Limpopo cases, the more altruistic impulses were supported by realism about material factors. Alongside the orientation to learners, there is for one teacher the fact that "a job is a job' and pays the bills. In this case, part of the reason for choosing the Foundation

Phase was the relative certainty of securing a position. The other teacher refers, with relief, to the realization, after starting to teach, that with some good financial management, teaching ***did not*** "bring about great poverty." Two teachers close to retirement pointed to pension benefits as an important factor in retaining them in their educational careers.

Given the upcoming teacher demographic shift, young teachers' views are particularly relevant. In Gauteng, four of the nine teachers, all women in their twenties, were recent "new joiners." Of these young teachers, one had a very early intrinsic motivation to teach, and while at school, formed groups to tutor her fellow scholars. She coped well with her own school work and naturally inclined to support her fellow scholars. Another young teacher had the ambition to become a radiologist but was convinced by her mother to become a teacher. Part of the motivation for her mother's advice was the perceived ease of availability of teaching jobs and being assured of getting a post.

The other two young Gauteng teachers became teachers "by default": they could not access funds for their preferred fields of study in the business and economic sciences and therefore, fairly quickly in the one case, and after a delay of some years after school completion in the second case, opted for the Funza Lushaka bursary and so became teachers.

For all three young teachers for whom teaching was not the first choice, the period of teacher training seemed to have made a big difference, helping to develop appreciation for their careers. Good practical teaching experience was one of the relevant factors but the realisation of what they could mean to children ("could touch two or three lives") and the status they will have with the children ("learners … looking up" to you) also contributed in some cases.[10]

In Limpopo, three of the teachers interviewed were young; two were women, and one was a man. The young man is a science and mathematics teacher for Grades 6 and 7, having taught in his first post at secondary school. Teaching was the first choice, as he loved children and wanted to be involved in their educational development. Seeing the children develop in mathematics and science motivates him to continue in the work; he wants to groom the next generation of Science, Technology, Engineering and Mathematics (STEM) students.

For both young Limpopo women teachers, teaching was the second choice, after nursing for one and medicine for the other. The aspirant nurse first received her acceptance for education studies, and the nursing approval arrived too late in the first year to make shifting feasible. Thus, she continued with education. She is now comfortable in the teaching position, "growing in the profession, ever adapting, and loving her job". The young woman who aspired to medicine does not specify the obstacle to medical study, but indicated that despite aspirations, she "found herself in teaching". She is now committed to the profession, motivated by the memories of one of her teachers and the ambition to leave an impression on learners.

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[10] Cosser also observed this "conversion" to teaching: "As the case studies of ten students have highlighted, the programme low-SES students complete is often not the programme in which they originally enrolled; but it is a programme they have learned to like. Crucially, they have learned to like the programme not in a resigned sense, but precisely through gaining epistemological access to its inner workings, by appropriating for themselves the internal goods of the practice which provide the sense of self-fulfilment envisaged by MacIntyre's imaginary chess-playing child, who comes to enjoy the game because s/he appreciates it for what it is and not for what participation in it throws up by way of external reward (the candy initially on offer)." (Cosser 2015, 147)

3. Teacher experiences and intentions

The aftermath of teacher rationalization in the 1990s and increasing awareness of the AIDS epidemic in the early 2000s saw concerns about future teacher shortages and a range of studies related to teacher supply and teaching. One of the aims of the HSRC investigation into HIV/AIDS in South African schools in the first half of the 2000s (Shisana et al. 2005) was to "determine the attrition rate among educators and reasons thereof", in order to assist with planning educator supply (ibid, xiv).

The study concluded, on the basis of a survey of 24,200 educators in 1,766 schools, that 55 per cent of teachers intended to leave the profession, with the proportion rising to two-thirds for teachers of "technology, natural sciences, economics and management educators". Low job satisfaction, job stress, and violence at educational institutions were identified as factors driving intentions to leave, and thus potential attrition (Shisana et al. 2005, xix). The top five issues driving job dissatisfaction were the status and respect of the profession (selected by 94.4 per cent of respondents), salary (73.2 per cent), stress related to "Outcome-based education" (70.5 per cent), stress related to "curricula, pass requirements, reporting system" (70.4 per cent) and high workload (61.9 per cent) (Peltzer et al. 2005, 94).

Shalem and Hoadley (2009:119) also refer to a range of other government studies from the then Department of Education and the Human Sciences Research Council that "have reported low morale, frustration and anger and a growing desire to leave the profession amongst teachers". They seem to agree with a finding of a trend of decreasing teacher motivation especially "for those who work in 'schools for the poor'". This declining morale they ascribe to continuing structural inequalities (or socio-economic conditions) relating to broad social conditions, family capacities, school management capabilities, and teacher knowledge assets, combined with an underspecified curriculum and bureaucratization of teachers' work (ibid, 120). They argue that, in light of the evidence, "a view is beginning to emerge that the combined effects of the economic and organisational factors have made teachers' work impossible" (ibid).

In similar terms, and mostly based on the same research reports used by Shalem and Hoadley, Deacon (2010, 38) concluded that South African "teacher morale is low". He identified several factors that contribute to low morale and status. These can be classified into four broad categories: **policy issues** (policy change overload, such as the introduction of the new curriculum and teacher quality management systems, and insufficient explanation of policy changes), **school inputs** (poor working conditions, overcrowded schools and classrooms), **status and remuneration** (relative to private sector occupations) and **broader societal factors** (learner ill-discipline and uneven parental participation and nepotism).

Some of the issues related to teacher experiences and morale, as identified in the studies, were addressed in government plans and strategies in the 2010s.

For some time, the Department of Basic Education's Action Plan has drawn attention to teachers' difficult working conditions. The 2010 Plan referred to large classes and that "teaching is a challenging job, especially if learners are from poor households. Almost every teacher will experience times when the frustrations are great" (South Africa, Department of Basic Education 2010, 22 & 28). To deal with these issues, it was indicated that the government would pay more attention to contain class sizes, that teacher pay had been improved, and that a reward scheme for "exceptionally good teachers" was being devised. Assessment rules were also reviewed to reduce paperwork and maximize teaching time and it was stated that

government "is committed to listening more to what teachers need" through both consultations with teacher unions and analysis of surveys (ibid, 28).

The Integrated Strategic Planning Framework for Teacher Education and Development (ISPF-TED) (South Africa, Department of Basic Education and South Africa, Department of Higher Education and Training 2011b) referred to "the poor public image of teachers, … the status currently ascribed to teachers" and the limited available funding for student teachers as being behind the low number of teacher graduates (ibid, 11). The following four outputs were set for this strategy:

- Identifying and addressing individual and systemic teacher development needs;
- Increased attraction of high-achieving school leavers into teaching ("strengthened teacher recruitment campaign", including "a focus on enhancing the image and status of teachers and teaching" and continuous enhancement of the Funza Lushaka bursary scheme);
- Enhanced teacher support at a local level; and
- An expanded and accessible teacher education system. (ibid, 11-12)

Some progress was reported in 2022 on the two most relevant outputs related to teacher working conditions and well-being, namely, identification of development needs and enhanced teacher support. On "enhanced teacher support" four activities were reported on, namely establishment of provincial and district teacher development institutes and centres (6 provincial and 141 district centres established), setting up professional learning communities (some established in all provinces), the rollout of new teacher induction programmes (done with donor support) and the establishment of teacher associations (established for English teachers at national and provincial level). (South Africa, Department of Basic Education [DBE] 2022, 6, 11–14 and 24–25).

The 2020 Action Plan of the DBE states that "working conditions for teachers remain difficult given the extent of large classes, infrastructure backlogs and insufficient opportunities for professional development" (South Africa, Department of Basic Education 2020, 14). Reference is also made to the problems of insecurity and violence in schools (ibid, 14), a factor that has received attention for some time and is still problematic in many areas (Zulu et al. 2004; Christian and Sayed 2023). The plan sees "teacher well-being [a]s a prerequisite for further educational progress" and "teacher well-being and job satisfaction" as one of the 27 goals of the plan (South Africa, Department of Basic Education 2020, 14). A commitment is made "to … a clearer emphasis on understanding the problems experienced by teachers, and on coming up with system-wide and sustainable interventions to tackle these problems". Effective leadership and management are considered the key enablers (ibid).

TALIS 2018, in focusing on "job satisfaction (including motivation)" (OECD 2019e, 24), indicates that issues of morale and job satisfaction, as identified from the beginning of the 2000s, remain a challenge in South Africa. The analysis of TALIS 2018 identifies South Africa as one of six countries "display[ing] percentages lower than the OECD average in support of the positive statements about the profession which are: 'the advantages of being a teacher clearly outweigh the disadvantages' and 'if I could decide again, I would still choose to work as a teacher'". They indicate that this may "reflect an overall pattern of dissatisfaction with the profession" in the country (OECD 2020, 84).

Eighteen per cent of South African teachers regretted that they decided to become teachers, against an OECD average of 9 per cent. Fifty-one per cent of South African teachers wondered "whether it may have been better to choose another profession" against an OECD average of 34 per cent and an European Union (EU) average of 30 per cent (OECD 2019c, tbl. I.4.34). In South Africa, around 40 per cent of teachers "would like to move to another school if that were possible", and the TALIS average was 21.3 per cent. Overall, 78 per cent of South African teachers were satisfied with their jobs, against TALIS and OECD averages of just over 90 per cent. (OECD 2019c, tbl. I.4.33)

Interviews

Responses about teacher experience relative to initial motivations, about motivating and demotivating factors, and intentions of staying in the profession, were used to form a judgement about morale and commitment. The 27 teachers were classified into three distinct categories, namely: "potential leavers", "demotivated teachers" and "committed teachers" based on: (1) explicit statements about morale and job satisfaction, and (2) the number and seriousness of concerns raised with the system.

None of the teachers indicated concrete plans for moving to another job or that they have looked in a focused way for other jobs. None seemed to have any specific alternatives in mind, except for some younger teachers who were contemplating office-based education jobs or moving to different schools. Most of the teachers also saw themselves still being in the profession in one year's time and also in five years' time. Most of the older teachers, at least those in their 50s, aim to stay on until retirement. Among younger teachers (interviewed only in Gauteng and Limpopo), and in some cases despite high levels of challenges and frustration, most are studying further in teaching. Rather than thinking about exiting teaching, they think about trying another school or promotion posts. Therefore, there are few potential leavers, with only three (in Gauteng) identified as such.

Of the 24 non-leavers, 14 can be classified as committed teachers and ten as "demotivated teachers". The division of teachers between the categories differed substantially between the provinces, with eight out of nine teachers being committed in Limpopo and seven out of nine teachers in Gauteng Province being either demotivated or potential leavers. In the Eastern Cape, four teachers were classified as committed and five as demotivated.

Limpopo

In Limpopo, the high numbers of motivated teachers (eight out of nine) are deduced mostly from people explicitly stating their job satisfaction and intention to stay and advance in their careers. Statements such as "been extremely happy in teaching … cannot think of hiccups or incidents that made me reconsider" and "been loving it ever since I began working as a teacher" came up regularly. The one clearly demotivated teacher in Limpopo explicitly stated that his expectations about teaching have not been met, that the quality of learners and staff is declining, and that he remains a teacher because he has no other options. Key extracts from the eight "committed" teachers in Limpopo are given in Text Box 1.

Text Box 1: Motivating factors for teachers interviewed in Limpopo

"The learners keep me going, I am proud to teach children who know nothing and see them absorb knowledge as time goes on. I really enjoy remedial education and helping children who have a poor educational foundation, especially those who transfer to our school from other schools."

"The children are … my main source of motivation – they are my dose of happiness. I am highly motivated, and I want to be so good at what I do that I one day receive a National Teachers Award – I don't think 10 years will pass without me receiving such an award. This motivation comes from having met another teacher who received this award and that inspires me to also want to receive one."

"My motivation comes from the good behaviour of the learners. It really keeps me motivated when I can brighten-up the faces of my learners and support them with their socio-economic issues."

"I like children, because even my other degree is related to children, they motivate me. Also, watching the children develop in the subjects I teach (mathematics and science) really motivates me."

"The respect and recognition I receive from my village, which is very rural, is immense. Especially from the youth, the ones sitting under the trees and looking up to me. They come to me for advice, and this lets me know that I am well-respected in my community."

"My main motivation is my learners, but I cannot escape the fact that I am here because the job pays my bills; in the end, a job is a job. However, when you work with children you consider them to as part of your motivating factors in that, I want to leave lasting impression on my learners, so that they'll remember me in the future that really inspired them. When I was in grade 1, I had a teacher that really motivated me, I still think about that teacher, …"

"I am fully focused on just being a teacher, because I realize my importance to these children and the community at large – if I do not play my part in giving these children an education, then who will?"

"… my main source of motivation is to develop black children to be literate and become better people in the future".

While the Limpopo teachers interviewed mostly communicated their commitment, job satisfaction, and ambition, they also had concerns and raised challenges. Demotivating factors that come up regularly with Limpopo teachers are "child rights" constraining the behaviour of teachers, lack of discipline in classes, lack of support from parents and class size. While infrastructure and a lack of inputs did not seem to be major concerns, the continued use of pit latrines was mentioned as impacting not only learners but also teachers.

Regarding the balance between child rights and the ability of teachers to manage, one teacher stated that because of this perceived imbalance, "teachers live in fear." Most Limpopo teachers also raised issues of discipline in classes and the absence of parental support as negative factors.

Five of the nine teachers mentioned class size as a constraint, a factor that makes teaching very challenging. One teacher commented, "My class size is 70 in technology. The class is not manageable, and I cannot move freely. It is difficult to control learners' work and to see who is falling behind, who is writing and who's not."

Negative factors that came up less often in Limpopo than in Gauteng were curriculum and curriculum change, workload/paperwork, school infrastructure and remuneration. The impression of the interviewer who visited both Eastern Cape and Limpopo was indeed that the

infrastructure in Limpopo schools visited was of a higher standard than in the Eastern Cape. Basic security (fences, gates, guards) seemed to be in place in Limpopo schools but not in the Eastern Cape. However, school sanitation and the continued use of pit latrines have become significant issues in several cases in Limpopo. Regarding remuneration, two teachers indicated that salary is what can be called "liveable".

Given what is known about school conditions in the more rural provinces and the regular focus on infrastructural shortfalls (especially regarding sanitation) and the availability of resources in Limpopo schools, the apparent levels of job satisfaction came as a surprise. One of the schools stood out as a well-managed school, and the school and community seemed to be quite entrepreneurial in securing funds for infrastructure and facilities. It may clearly be that exceptional schools were selected.

Eastern Cape

There were no young teachers included in the Eastern Cape interviews. Four of the teachers were older than 50, and five were middle-aged (31-50). In this province, four teachers were classified as committed, and five as demotivated.

Two of the five demotivated teachers indicated that they would consider other opportunities if they had become available. In both cases, one of the strong demotivating factors is that teachers feel that teaching does not enable them to afford basic things, such as buying a house or a car. In one case, there was also concern about the perceived unfairness of the promotion system. A third teacher indicated that he had wanted to move away from teaching for some time, despite a passion to work with children, but is staying "to put food on the table". In this case, frustration was expressed about the pressure from the department, on the one hand, and from parents, on the other hand. The other two teachers classified as demotivated had long lists of intense concerns about the system.

The most common concerns among the nine teachers in the Eastern Cape were curriculum and curriculum change (from five of the teachers), followed by remuneration (four). Three teachers each identified school infrastructure (often combined with security issues), inadequate departmental and district support, lack of parental support and a perceived imbalance between the rights of children and those of teachers.

On curriculum and curriculum change, one teacher indicated that in the past she could "create her own schedule" but now the syllabus dictates what units and chapters should be covered. This was associated with having to "rush" through work and letting children do a lot of written work because "you won't be able to help all of them due to the amount of work you have". Another teacher points to the changes in curriculum, the increase in paperwork, and that to stick to the curriculum timing, a teacher has to move on to other areas of work, even before some learners understand adequately: "So you do this, you drop it, and the children do not understand, they end up blank because there is confusion." This led to this teacher seeing "pressure from the department" as a big challenge, which is compounded by "pressures from parents". Concerns about curriculum and curriculum change were one of the most common complaints across provinces, although they were less common in Limpopo.

Concerns about what was felt to be an excessive focus on the rights of children were formulated as follows by one teacher: "Another challenge is the rights of learners. There are no responsibilities. The government will say these are rights, but when it comes to a teacher, we

are just nothing." While not the most common concern, this concern was raised in all provinces by 10 of the 27 teachers.

In the Eastern Cape, committed teachers all have specific reasons to stay, despite also identifying negative aspects of the teaching environment. For one teacher, it is too close to retirement to consider alternatives, a second feels "treated in a good way" by the current school (in contrast to the previous school), and a third, somewhat younger teacher, is still studying further and has an ambition to be the Foundation Phase Head of the Department. The fourth committed teacher is explicit on still being a teacher for five years and is motivated by some of the learners who are eager to learn.

Among the teachers interviewed in the Eastern Cape, little difference was observed between committed and demotivated teachers. Both groups generally exhibited low levels of job satisfaction and morale, while one or two isolated cases of enthusiasm were observed.

Gauteng

While none of the strongly positive expressions of job satisfaction and morale expressed in Limpopo could be found in Gauteng, the general level of morale seemed better than in the Eastern Cape. While teachers raised several concerns about their work environment and socio-economic context, this was balanced by a strong commitment to the children and the realization of the importance of teachers. Among older teachers, there are many who were close to retirement, and these seemed somehow a bit defeated. Younger teachers were enthusiastic about the children they teach, have studied further, or were almost all studying further in education and seem to be in touch with, and have empathy for the children they work with.

One teacher, for example, had a number of acute observations about her learners: the boy who struggles to write but is very creative at making things; the Grade 4 girl who is very clever but where a lot of energy is already going into the "side-hustle" or activities to generate cash; and, how children get enticed by the informal businesses in the vicinity of the school and drawn into potentially damaging interactions. Drawn into education studies by the Funza Lushaka bursary, her training turned her into a committed teacher, but the demands and lack of room for flexibility to address the needs of different learners, have left her frustrated and are reducing motivational levels.

In Gauteng, three teachers (two young women and one middle-aged male) could be identified as "potential leavers". In one case, this was related to a combination of having wanted to pursue an earlier dream in the medical sciences together with difficult working conditions (a very large school, with class sizes of 60 to 70s, a very poor school community that impacts learner energy and motivation, and challenging working conditions, including prefabricated classrooms). The other two teachers raised large classes (in one case, a Grade 2 class with more than 70 learners), working conditions (for example, dilapidated classrooms) and the experience and perception that salaries just did not allow for reasonable living in the urban environment of Johannesburg as demotivating factors. Regarding remuneration, one teacher referred to the impossibility of affording the school and university fees of children and the other confessed to a feeling of "letting down the family" with regard to income earned. These factors lead to what seems to be low job satisfaction and an urgent sense of need to escape, although both teachers appreciate the importance of the work and empathise with the children.

The two teachers classified as committed in Gauteng include one young teacher who feels herself a born teacher and who tutored from her schooling days. She expressed thinking about teaching as her calling, but after three years, she found teaching challenging. She is studying an honours' degree in teaching to help deal with challenges to the motivation and will be looking for opportunities at other schools. The other teacher is close to retirement and as the school has shown great understanding with her health condition, she is committed to continue until retirement.

Compared to the other provinces, the teachers in Gauteng raised many diverse issues. The most common concern raised, together with the lack of parental support and attitude, was the curriculum. Seven of the nine teachers raised both these issues. One young teacher indicated that the curriculum was "failing" them. It is seen as very full and necessitating "rushing" through work and leaving children behind. An older teacher felt that the curriculum was not focused on the child and imposed a lot of unnecessary, "petty" things for kids to do and "paperwork". The young teacher committed to teaching from her school days and who started tutoring very young, described the curriculum as "very ambitious" and trying to cover too much material in the available time. Another young teacher raised the "many changes to the curriculum" and insufficient support to internalise and implement the changes ("you understand in workshops but difficult to apply in class"). At another school, a young teacher felt that the curriculum was too full and referred to it as a "straitjacket". An older teacher referred to the curriculum changing repeatedly and a perception that things were changing all the time, and they were in constant "piloting" mode. The constant changes were also linked to what was described as a proliferation of "instructions from above".

Much was also said in Gauteng about the other most common concerns: lack of parental support and parental attitudes toward school and supporting children. An older teacher believed that parents do not care about their children, since they leave them with grandparents, which was echoed by an older teacher in the same school. At another school, an older teacher indicated that parents did not respond when there was a request to discuss a specific child. One of the young teachers felt that parents specifically did not trust and respect younger teachers, and only trusted older teachers. The lack of support from parents is also mentioned by one of the principals, and another adds specifically that the inability of parents to support children puts additional burdens on teachers compared to those in wealthier communities.

The third and fourth most common concerns from the Gauteng teachers were class size and school infrastructure, both mentioned six times. Among the teachers interviewed, the smallest class was Grade 3 (31 learners). Other class sizes at this small school focused on Setswana speakers (and with a large primary school with Zulu as the main language next door) were 41 for Grade 1 and around 40 for Grades 4 to 7 classes. The second small school, with a focus on Tsonga (Tsonga as the first additional language), had much larger classes: 75 in Grade 2, up to 62 in the intermediate phase in some subject areas, but 40 to 50 in the intermediate and senior phases for mathematics and science. In the third, large, school, class sizes were large, with classes of 50 to 60 for one teacher and 60 to 70 for the other two. Class sizes could have varied because of the four different language streams of the school.

Infrastructure in the Gauteng quintile-three schools visited was better than that in the other two provinces, with good fencing at all three schools, entrance control at the gate, solid structures, waterborne sanitation and basic (or underdeveloped) spaces for play for the children. Facilities

were, however, old, with the Soweto schools probably dating from the 1950s or the 1960s and the Midrand school (and administrative block) consisting of ageing, prefabricated structures. While sound spaces and order existed, teachers raised a range of issues. These included dilapidated infrastructure, especially inside classrooms, and classes that were not cleaned regularly. At the prefabricated school, dust was a big problem, and it was believed to have led some teachers to develop sinusitis. For at least two of the schools there were references to blackboards having fallen down and creating a potential danger for learners.

Teachers were concerned about the absence of ICT in the senior phases. While one of the three schoolteachers had laptops, and training was provided by the department, there were concerns, especially in the more senior phases, about the non-availability of media to teach and engage learners. Generally, the conclusion could be that while infrastructure and facilities existed, and were not the worst in the country, they certainly did not inspire innovative teaching and were not appropriate for the industrial and commercial heartland of South Africa.

The perceived imbalance between the rights of the children and the rights of parents was raised by three Gauteng teachers and one principal. This issue arose in the context of not being able to discipline and punish children when they do not do their homework. For another teacher, demotivation and disempowerment came from several perspectives: inadequate remuneration, inability to discipline, and being overruled by the department on the promotion of learners. One teacher said, "teachers are not free because there is no discipline."

On remuneration, many teachers saw themselves as underpaid. Some of these points are as follows:

- "Pay is little and it is difficult to survive. Tax is a lot"

- "Remuneration does not match what is expected of teachers. Learners go out and quickly earn more than teachers and look down on them."

- "Teachers are underpaid. They earn a pittance compared to doctors and pilots who they train."

- "Teaching is very hard work for the pay teachers get."

A fifth teacher, however, echoed one of the teachers in Limpopo when she said, "you can live on the salary if you know how to manage well."

The Gauteng teachers continued teaching despite the many issues they raised, because they all seemed to appreciate the importance of teaching (for the future of the children and for the future of the country) and developed bonds with and empathy for the children. Nonetheless, some older teachers are close to retirement and would not want to change their careers. Among younger teachers, there do not seem to be many available alternatives that would pay more for the same skill set.

A theme that came up several times in Gauteng and the Eastern Cape but not so strongly in Limpopo is that of the structure of households and the impression that children often have young parents who are not as responsible as they should be. A number of these teachers perceive that children are often left with grandparents who have difficulties supporting children with their schoolwork. Four teachers in Eastern Cape raised this issue in similar terms, with one also mentioning that the parents were in Cape Town. This view was strong in one Eastern

Cape school (coming from all three teachers at the school who were interviewed) and one teacher at another school. This issue was also raised by four teachers in two schools in Gauteng. In the third school, the socioeconomic conditions of the children (in a community with substantial informal settlements) were raised but not in terms of household structure. In Limpopo, the issue of children living with grandparents also arose several times, but less strongly. In two cases, it was mentioned together with the issue of child-headed households as a factor that complicates teaching. One other teacher, however, thought the situation applied to a limited number of children (10 per cent) and another saw it as a problem of "way back" in the 1990s when she started teaching.

4. Recruitment

Legal framework for appointment of educators

Recruitment in basic education in South Africa is regulated mainly by the Employment of Educators Act, 1998 (EEA) (South Africa, Government 1998). The EEA sets the framework for teacher recruitment and appointments in three main ways.

The Act first establishes the authority of provincial MECs to determine the number of posts in provinces and schools and, second, the authority of the head of the provincial department to make appointments on behalf of the provincial education department, which is the employer of provincially funded teachers. However, an appointment to the staff of specific schools by the head may only be made after a recommendation from a school governing board (SGB). Where a province has educators additional to its establishment ("in excess") the SGB's choice may be restricted to appropriate educators selected by the head of department from such a list of teachers in excess to the establishment.

Second, the EEA sets out broad principles for appointments (for example, the need to consider both ability and the need for redress) and related aspects. The latter includes processes such as the transfer and secondment of educators and termination of services (South Africa, Government 1998, 10).

Third, the EEA establishes the power of the Minister of Education to determine the conditions of employment (South Africa, Government 1998, 6). The Minister publishes these service conditions in the Government Gazette after agreement with the Education Labour Relations Council (ELRC). These regulations are consolidated in what is referred to as the Personnel Administrative Measures (PAM), of which a consolidated version is regularly published. The most recent version is that of South Africa, Department of Basic Education (2022). These employment conditions include further arrangements with regard to appointments (South Africa, Department of Basic Education 2022, 61), minimum requirements to be employable (ibid, 62ff) and rules with regard to the "advertising and filling of positions" (ibid, 109–12).

In terms of appointments, PAM identifies four steps (South Africa, Department of Basic Education 2022, 109–12):

- *Advertising*: All vacancies in public schools "are to be advertised in a gazette, bulletin or circular" and the existence of such document must be communicated "in the public media, both provincially and nationally".
- *Sifting*: Provincial education departments must acknowledge receipts, identify applications that do not comply with requirements (sifting), and pass on compliant advertisements to school SGBs.

- *Short-listing and interviews*: SGBs establish interview committees, which must include observers from union parties to the ELRC and recommend at least three candidates to the head of the department.
- *Appointment*: The head of department appoints "any suitable candidate on the lists" from the SGB or declines a recommendation, in which case the head of department may make a temporary appointment or readvertise. Unsuccessful candidates must also be notified that they were unsuccessful.

Figure 4 provides an overview of what the stipulations of the PAM translate into in practice and provides an indication of the duration of the process to comply with the regulations. In Western Cape, the process of closing the vacancy lists until notification of successful candidates is estimated to take four months. The relevant processes were further set out in a 2017 guide from the Western Cape Province (Western Cape Province, Education Department 2017) and the Western Cape Education Department's "preface" to their first 2023 "vacancy list" (Western Cape Province, Education Department 2023a). Similar rosters could not be found for any other province, nor could any provincial advertisements or vacancy circulars for school-based post-level 1 teachers for any of the other eight provinces. Only vacancy circulars for school-based promotion posts and office-based staff could be accessed in these provinces. For Western Cape, current posts available could be viewed on the online e-recruitment portal (Western Cape Province, Education Department 2023b).

Table 1: Western Cape Education Department, Institution-Based Educator Vacancy Roster, 2018

ACTIVITY	VACANCY LIST 1	VACANCY LIST 2	VACANCY LIST 3
WCED opens the electronic vacancy list for the institutions and education districts	Continuously open	Continuously open	Continuously open
Principals, SGB's and Circuit Team Managers can capture vacancies on system	29 January 2018	4 May 2018	13 August 2018
Closing date for Circuit Team Managers to check and verify advertisements	05 February 2018	14 May 2018	20 August 2018
Publication of Vacancy List	**15 February 2018**	**01 June 2018**	**03 September 2018**
Closing date for receipt of applications	19 March 2018	26 June 2018	21 September 2018
WCED sends applications to District Offices	18 April 2018	24 July 2018	12 October 2018
Competency-Based Assessments (promotion posts)	19 April 2018 – 11 May 2018	24 July 2018 – 10 August 2018	15 October 2018 – 02 November 2018
SGB's/Schools submit nominations to WCED	15 May 2018	13 August 2018	5 November 2018
WCED informs applicants of appointments	01 June 2018	28 September 2018	01 January 2019
Closing off of vacancy list –outstanding nominations	31 July 2018	06 December 2018	30 April 2019
Date of appointment	**01 July 2018** or a later date as decided by the WCED	**01 January 2019** or an earlier or later date as decided by the WCED	**01 April 2019** or an earlier or later date as decided by the WCED

Source: Western Cape Province, Education Department, 2018. The latest roster showing an abbreviated process is the Western Cape Province, Education Department, 2023.

The South African Schools Act 84 of 1996 (SASA) is also relevant to the appointment of educators as it identifies, among other things, "recommendations to the Head of Department on the appointment of educators at the school" as a SGB function. The Act also empowers SGBs to establish educator posts at schools in addition to those established by the MEC, in which case the school will be the employer of the teacher and the school must provide for the funding of the posts. (South Africa, Government 1996, G 17579:27–28)

Appointment of temporary educators and other approaches to appointments

The regulatory framework provides provisions for both permanent and temporary (fixed period) appointments, as well as the conversion of temporary appointments to permanent appointments. Neither the EEA nor the PAM stipulates that the regulations for appointments (such as national advertising and sifting by the provinces) apply to temporary posts, nor do they establish alternative rules for temporary appointments. However, provinces seem to work on the basis that these regulations do not apply to temporary posts, and the appointment of temporary teachers with later conversion to permanent posts may have become the most common method of proceeding.[11] One province informally confirmed that vacancy lists were no longer published for post-level 1 educators. The current convention dictates that appointments of new staff are made first as temporary teachers, after which they are converted into permanent posts. No recent vacancy lists for post-level 1 posts could be sourced for any province except Western Cape.

In a 2020 circular outlining the implementation of the 2021 educator post establishment (Gauteng Province, Education Department 2020), the Gauteng Education Department identifies four ways of filling vacant posts, with none of these referring to the open advertising process as per the regulatory framework (and in Western Cape documentation). The four routes for filling posts, in order of priority, are (Gauteng Province, Education Department 2020, 3 and 7):

- Placement of already employed educators, now in excess (additional to the establishment), in "concomitant post levels and competencies".
- "Conversion of qualifying contract educators" or temporary positions, to permanent positions.
- "Matching and placement of new entrants" (presumably from the list of bursary holders) to growth posts.
- Contract or temporary appointments for a year.

Temporary appointments seem to be managed at the circuit or district level, and often at the school level. In July 2022, the Gauteng Education Department (GDE) further clarified the process of recruiting temporary post-level 1 educators (Gauteng Province, Education Department 2022). Schools must submit a vacancy form to the district whereafter the district will match the post requirement, firstly, against a list of excess teachers, secondly, against a

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[11] For North West province Diko (2009, 265) reports as follows: "In some cases the teachers report that principals who wish to influence who joins their staff opt for temporary employment. This strategy, according to participants, has the double advantage of being less cumbersome and less time consuming. Principals are allowed to recruit teachers without going through the process of advertisement and interviewing candidates. They can identify a need and fill a temporary position immediately. Once appointed, temporary teachers are supposed to remain in their position for three months. If the school wants to extend the contract of a temporary teacher, it is free to do so."

list of "first entrants" (recent graduates, seemingly, from a Funza Lushaka list but also recent graduates from the GDE Unemployed Educators Database), and, thirdly against the full GDE Unemployed Educators Database. Schools are advised not to receive CVs directly from unemployed educators but to advise them to register on the database for unemployed teachers.

Practice

The legal framework for teacher appointments prescribes an open, transparent and **competitive process** for the appointment of posts, with open advertisements of posts a requirement, and SGB selection from qualifying candidates.[12] What seems to be the actual process in provinces, except for the Western Cape, is a more centralised, **closed provincial administrative process** with administrative matching of vacant posts against priority lists: first, against a list of teachers additional to establishment in a province; second, against current temporary or contract teachers (not appointed through an open process); third, against a list of bursary holders; and fourth, against the database of unemployed teachers. SGBs still play a role but are mostly from a list of candidates identified by officials.

For example, the closed administrative process in Gauteng seems to have replaced more **school-based or localised processes where temporary posts were advertised in a variety of ways**, mostly by schools (word of mouth, informal network, social media) and applications then considered by SGBs before recommendations to the department via districts. It is unclear how much of this localised process still operates but there is some evidence of this on social media, in particular in the form of advertisements on Facebook ('SA Unemployed Educators | Facebook' n.d.; 'Teaching Posts In South Africa | Facebook' n.d.)

There seems to be almost no systematic monitoring of appointment processes and no standardised data available in the public domain. There is also very limited analysis and research that provides information on appointment processes and their efficiency and effectiveness. Some studies on teacher education have incorporated aspects of recruitment, which have also received attention in studies examining the broader political economy of education.

One teacher training study that looked at recruitment is Deacon (2015b)[13], in which he concludes that "… provincial education departments, district offices and universities are not portrayed by respondents as helpful as they could be. These role-players, along with bursary providers and SACE, could increase their efficiency and eliminate any delays in processing documentation received" (ibid, 100). In a later report, based on information from originally surveyed students, then teachers, Deacon concludes that the employment of newly qualified teachers "lacks coordination and planning" with the onus on jobseekers to judge demand and find posts. Word-of-mouth played a significant role. He also spoke of administrative inefficiencies and "bureaucratic incapacities" (Deacon 2016, 16–17).[14]

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[12] Meny-Gibert (2022, 64–65) talks of the post-apartheid government introducing "a new model of democratic participation and citizen engagement" and in teacher recruitment "a new process of open, competitive interviews, to be managed by newly instituted, democratically mandated School Governing Bodies (SGBs) [representing] the interests of parents, teachers and the local community". This "model of democratic decentralisation" is contrasted with the apartheid state's "centralised, sometimes opaque processes of teacher appointment". De Jager and Pretorius (2022) refer to the introduction of a "system of cooperative school governance" encompassing a "three-tiered partnership between the national and provincial governments".

[13] The analysis relied on questionnaire information provided by 1,476 teachers that qualified in 2013. The reported final year B.ED and PGCE students in 2013 were 17,563 of which 3,465 responded to a 2013 questionnaire and 1,476 to the follow-up in 2014. (Deacon 2015b, 20–21)

[14] He also talks about "glaring flaws in the manner in which provinces and schools coordinate, place, welcome, utilise and generally manage new teacher graduates" (Deacon 2016, 19).

Diko, in an older study focusing on the North West province, argued that the implementation of recruitment policies was the problem in the teacher labour market and not overall supply or demand. He referred to appointment processes being "counterproductive" (2009, 254). The biggest concern seemed to be that appointments take a long time and SGBs do not play their envisaged role because parents are dominated by principals and officials in the appointment process.

Official reports have also pointed to inadequacies in recruitment processes and have proposed improved strategies and processes. A joint technical report by the Departments of Basic Education and Higher Education and Training (South Africa, Department of Basic Education and South Africa, Department of Higher Education and Training 2011a, 12) talks of "sluggish and cumbersome recruitment and employment processes" in provincial departments.[15] A list of recommendations from a range of studies includes that provincial education departments should promptly identify and fill vacant posts, and that [teacher] hiring and appointment practices should be monitored (ibid., 14). An "enhanced teacher recruitment strategy" was proposed (South Africa, Department of Basic Education and South Africa, Department of Higher Education and Training 2011b, 11) and there has been reporting of some progress, including the publication of "guidelines for teacher recruitment", "district- and community-based recruitment", "advocacy" and preparation of provincial plans (South Africa, Department of Basic Education 2022, 11).

Meny-Gibert (2021, 166–67) points out that human resource management was mentioned as one of the biggest challenges for the Eastern Cape Education department in its 2014 annual report. It was reported that "processes are slow, and budgets under stress, resulting in high levels of staff vacancies across the system – in senior management, positions below management, and in schools …".

While the source of recruitment inefficiency, as in Deacon above, is often looked for in technocratic factors of planning, coordination and administration, the underlying factors of political economy are also important. Bennell, for Sub-Saharan Africa more generally, has suggested that "the recruitment process for teachers has become politicised in some countries" (Bennell 2022, 16). Deacon (2015b, 97) adds to "bureaucratic inefficiencies" as a factor driving weak outcomes, also "vested interests". Several studies, both historical and contemporary, have pointed to patronage networks and corruption in the education system as a factor in who gets appointed, and that these impact on efficiency of processes and on learning in schools.

The education sector seems to mirror the broader South African public governance environment where public resource flows are tapped for personal or political purposes. The most common mechanism may be the siphoning off of rents from procurement processes (a portion of the contracted price flows to facilitators of the selection of a provider), and appointment processes can also be used to secure benefits. These benefits can be in cash, as in the case of procurement by paying a bribe to be appointed, or in other forms of benefits, such as loyalty in future appointment processes, procurement processes or even elections and trade union leadership elections. These exchanges of favours and benefits lead to the thickening of extensive patronage, indebtedness, and loyalty networks. Decisions in bureaucracies are then

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[15] Also, "the administrative process by which teachers in general are appointed, transferred, replaced and/or determined to be in excess is slow and cumbersome … ". (South Africa, Department of Basic Education and South Africa, Department of Higher Education and Training 2011a, 42)

made not on the basis of impersonal rules but become personalized and factor in a range of considerations beyond the quality of public service delivery. Several examples have been reported in the literature.

For the late-apartheid period, Phillips has pointed to schools during the period 1972-1990 in one homeland becoming "volatile sites of power struggles" and that this "localisation" of schools made their "daily function [becoming] a reflection of local community battles" (Phillips 2015, 300). While this saw schools becoming targets for resource extraction and accumulation (even through rights to run school tuck shops), it also saw battles about appointments, with, for example, conflict between education officials (including school principals) and community representatives about appointing "foreigners" (non-local people) to "local jobs" (ibid., 310 and 313).

In response to press reports of "purchasing" of education posts by teachers (paying an amount of money to be awarded a specific, often promotional, post), the Minister of Education established a task team to investigate, which reported in 2016. Of concern was that the "allegations pointed to possible widespread corrupt practices involving the irregular appointment of educators across provinces, districts and schools …" (Ministerial Task Team, Selling of Posts of Educators 2016, 11). In its investigations the task team "… became aware that there are many forms of irregular appointments" and that there are "widespread practices of improper and unfair influencing affecting the outcomes of the appointment of educators …" although "[i]n only a minority of cases are there numerous claims of money being paid to influence the outcome."

Both Kota et al. (2018) and Meny-Gibert (2021, 2022) investigated the situation in the Eastern Cape and found contestation around appointments from different groups. Typical forms of intervention would be "gratification [to union leaders] in return for allocating several principal positions" (Kota et al. 2018, 140), district officials "abetting procedurally unfair appointment processes" (ibid, 142), "significant pressure" being put on principals with respect to vacant posts and promotions (ibid, 143) and fabricated charges against principals to get them out of position "as the means of paving the way for promotions" (ibid). Meny-Gibert (2022, 160) refers to networks aimed at controlling district office and school posts through, for example, pressure on district offices to support networks and turn a blind eye to disciplinary transgressions. She writes that "groups of unionists, prominently from the South African Democratic Teachers Union" in the Eastern Cape influences the filling of positions at all levels through party political structures, labour action and protest, using networks of officials and through threats of violence.

Depending on their specific histories, some regions have particularly dense networks of patronage outside or parallel to official structures, often consisting of different factions working not only against the rules but also against each other. The existence of various factions often leads to violent conflicts. In part of the Eastern Cape, patronage networks come from apartheid-era homeland clientelist systems (Kota et al. 2018, 121), on top of which are overlaid networks that developed in the struggle against apartheid and also from the early days of the push for democratic transformation (often referred to as "cadre deployment") (Pattillo 2012, 18)[16]. In addition, decentralization after apartheid and the introduction of elements of New Public

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[16] She describes "cadre deployment" as "an unwritten policy of patronage-based political appointments to school leadership positions". (Pattillo 2012, 18)

Management (such as outsourcing) opened up more spaces for siphoning off public resources in the context of high levels of poverty (and therefore, a search for livelihoods) and expectations of rapid advancement ("upward mobility") after apartheid discrimination and deprivation (Meny-Gibert 2022, 11). Meny-Gibert sees a continuum (from a local perspective) of elites vying for upward mobility ("predatory politics") to attempts to "secure precarious livelihoods" (ibid). She also argues that there is a complex interplay of local factors and more regional and national dynamics, between "localised contestations" and "wider [political and union] networks".

In areas with such syndicates and contestation, appointment processes are likely to be negatively impacted by limited access to information (secrecy), and appointments being considered on the basis of factors not relevant to effective learning. Beyond the direct negative impact of the presence of ineffective teachers on learning, it has also been argued that unfair and improper appointments impact incentives, school culture (Pattillo 2012, 67), and trust in the system, which is necessary for cooperation and improvement. These toxic cultures and environments with lack of trust have an impact on teachers' morale and motivation and the ability in the long run to fill teacher posts with good candidates. The problem with networks of corruption is also not just with what they directly produce (low level of learning) but also that they are so resistant to change because of vested interests.

The Integrated Strategic Planning Framework for Teacher Education and Development (South Africa, Department of Basic Education and South Africa, Department of Higher Education and Training 2011b, 11), insofar as recruitment was concerned, focused mostly on advocacy of teaching as a career. It was not based on a systematic analysis of recruitment problems in the system. While the Department of Basic Education indicated that steps were being executed to deal with corruption in the school system, stakeholders have indicated that corruption is still rife (Ncala 2022) and that the recommendations of the Volmink Report have not been implemented (O'Regan 2023; Schirmer and Visser 2023). Some of the steps taken by the department have been criticized for attacking the rights of parents and SGBs (De Jager and Pretorius 2022).

Interviews

All three Eastern Cape principals indicated that appointments are managed through circuit and district offices and mostly through what was referred to, in slightly different terms by each principal, as the "redeployment pool", the "shortlist of available people" or lists of staff "additional in other schools". One principal refers to these "additional teachers in some schools" as an advantage because a normal appointment is "a long process" through the district office.

If there is no availability from these lists, posts can be advertised and the standard process as per the Employment of Educators Act (1998) followed. One principal believed that because of being restricted to these priority lists, schools sometimes get inappropriately qualified teachers. A second principal expressed concern that the prioritization of recently qualified bursary holders may result in a loss of the benefits of experience. In addition to Funza Lushaka bursary holders, an Eastern Cape-specific bursary, the Matthew Goniwe bursary, was also mentioned as part of the priority list.

Different Eastern Cape teachers have different perceptions of the recruitment process, with two indicating that they experienced no problems with the recruitment process and that it was easy to obtain information about available posts. In contrast, two teachers pointed to difficulties in obtaining information about the posts. Two teachers pointed to delays in finding posts after they qualified, with one being unemployed for two years after qualification. The other was grateful for getting into the system through temporary and substitute positions before getting a permanent post.

For Gauteng, two principals indicated that for post level 1, appointments were until the recent past decentralised to schools, meaning that schools could advertise posts and then follow the appointment process, including shortlisting and recommendations to the district, for the provincial Department of Education to appoint. These school-level processes did not include advertisements in a vacancy list but seem to have used a range of local advertising methods, such as social media, newspapers and radio. However, as set out above on the basis of Gauteng Circulars, this approach has changed recently. The process is now that when vacancies open up, they are submitted to the district which then will, from various lists, such as excess teachers, new entrants, and contract teachers, provide candidates to the school to be processed by the SGB. The third principal did not provide much information about the recruitment system. He indicated that they have not had many positions to fill recently, but that appointments have been working well because the Department provides the school with the Funza Lushaka database and the school can then approach potential employees.

For the four young Gauteng teachers, three of whom were Funza Lushaka holders, their experiences varied. Only one of the students was contacted by the department shortly after the completion of her studies and offered a post. A second bursary holder had a waiting period after the completion of her studies, before being contacted by the school where she is now. The third Funza Lushaka student was not approached by the department or school for some time and eventually approached the school where she was currently teaching after coming across an advertisement on Facebook. The fourth Gauteng Funza Lushaka bursary holder moved from KwaZulu-Natal to Gauteng after her studies and was offered a post after she gave her details to a district office.

Limpopo principals also indicate that there is priority placement for bursary holders. One indicated that Funza Lushaka bursary holders had priority, followed by NSFAS students. It was said that in case of bursary holders, posts do not need to be advertised and there is no need to go through the normal interview process. One principal indicates that this "makes recruitment much less tiresome than before" while another is concerned that, as a result, "others [non bursary holders] are having problems to get posts". Beyond priority placements, gazettes are issued for promotion posts, and principals are well versed in the normal appointment processes, as set out in the Personnel Administrative Measures, clearly describing the key steps. Two principals indicated that appointment processes can take a long time, one pointing to a 6-month wait, from March to August, to have the school's 14th post filled.

Older Limpopo teachers all indicated that information about posts was available from a large number of sources, ranging from schools and circuit offices to grocery stores, pamphlets and radio. Vacancy lists or bulletins are not mentioned but there is a reference to "advertisements". Visiting schools and district offices is mentioned, as is "word of mouth".

Among the three young Limpopo teachers, of whom two are Funza Lushaka bursary holders, there is no mention of bulletins or vacancy circulars. One bursary holder indicated that she did not have to perform applications or interviews. She was offered posts by more than ten schools and picked the school with the best reputation. A second Funza Lushaka bursary holder did not offer herself, but, based on a referral from a fellow student who received two offers, got a telephonic interview with a panel from her current school and secured the position. The third young teacher, previously a high school teacher, heard about his first post from a friend and then went through a quick shortlisting and interview process. He indicated that while many of his peers got posts easily, some struggled but eventually got posts.

5. Conclusions

5.1 An 'incipient renewal" of the teaching profession?

The South African education system faced several teacher-supply threats in the 1990s and the 2000s. "Rightsizing" in the 1990s seems to have impacted teacher training enrolment, and the intensification of the AIDS pandemic in the 2000s increased sickness and deaths among the teacher population. There was also a growing concern about the extent of learning in South African schools and the important role of teaching and teachers in turning around the situation. These threats saw an increase in research in the area and a focus on policy and strategy that saw positive initiatives.

A number of these initiatives were proposed in the joint DBE/DHET Integrated Strategic Planning Framework for Teacher Education (South Africa, Department of Basic Education and South Africa, Department of Higher Education and Training 2011b). Progress in implementation has been reported recently (Mweli 2021; South Africa, Department of Basic Education 2022). Some positive developments include the following:

- Strategies to bolster supply, primarily the Funza Lushaka bursary schemes and district student recruitment drives;
- Efforts to standardize and improve teacher training at universities;
- Steps to absorb newly qualified teachers, the Funza Lushaka-funded teachers, as well as newly qualified teachers more broadly and unemployed teachers;
- Mechanisms to support teachers, such as provincial and district teacher development institutes and the establishment of professional learning communities;
- Future plans that include "strong interventions for teacher well-being [including] psychosocial programmes".

The number of teachers interviewed in this study was too small to conclusively confirm the positive impacts of these developments. In addition, the 27 teachers are all from middle-level (Quintile 3) township schools and therefore not from schools in the poorest and most marginalized communities, where there is significantly more pressure on teachers.

Nonetheless, there were positive signs in the interviews. While we did not interview any young teachers (below thirty years of age) in the Eastern Cape, in both Gauteng and Limpopo there is evidence of the Funza Lushaka scheme funding talented young South Africans to study teaching, some who had been aspiring teachers from early on in their lives, but in addition, some who may not have studied teaching was it not for the bursary. Their training at

universities and practical teaching experience supported them in becoming dedicated early career teachers.

In Gauteng, young teachers often continue postgraduate studies and we found empathy and understanding of the circumstances and specific talents of learners among some of them, and an ambition to care for these children. In Limpopo, the young teachers interviewed were generally positive about their profession and wanted to support the next generation of South African adults. Some were ambitious regarding further studies and promotions in the profession. Individuals also envisage improving the policy and leadership of the system from research and management positions.

More in-depth qualitative work and larger samples are needed to weigh these conclusions, as well as for closer monitoring and evaluation of policy implementation. However, there are signs, in Cosser's (2008, 212) words of the 'incipient renewal of the teaching profession" or, in the words of the Action Plan, "attract[ing] a new group of young, motivated and appropriately trained teachers to the teaching profession" (South Africa, Department of Basic Education 2020, 14).

5.2 Threats to renewal of the profession: aspirations, work experience and recruitment

Aspirations and working conditions

Beyond the positive signals from the interviews, there were, however, many echoes of earlier research findings pointing to low aspirations with regard to becoming teachers, to difficult teaching conditions negatively impacting commitment and morale and room for improvement in the recruitment system.

Earlier studies concluded that school leavers had low aspirations to become teachers (Cosser 2009, xv). The OECD's TALIS 2018 found that, for South Africa, a relatively small proportion of teachers thought of teaching as their ideal (first-choice) career (OECD 2019b, 16). Less than half of the teachers interviewed in this study had teaching as their first choice of career. Access to training and, among the younger teachers, the availability of the Funza Lushaka bursary scheme drew some of these on to teaching, although easier acceptance into the programme and parental persuasion, in some cases related to job certainty in teaching, also played a role.

Regarding job experience and job satisfaction, earlier South African research came to strong conclusions related to challenging working conditions, low job satisfaction and low morale. An HSRC Study (Peltzer et al. 2005, 94) pointed to high levels of intention to resign, driven by low levels of job satisfaction, job stress and violence. Chisholm et al. (2005, x) spoke of "changing requirements in teaching and learning contexts" being experienced as "an unbearable increase in workload" and that "class size and the diversity of learning needs in classrooms make it virtually impossible to meet teaching and additional requirements adequately". Deacon (2010, 38) identified "low teacher morale" and Shalem and Hoadley (2009, 120) wrote that "a view is beginning to emerge that the combined effects of the economic and organisational factors have made teachers' work impossible".

Teaching conditions vary significantly across schools, depending on socioeconomic conditions. Shalem and Hoadley (2009, 120) highlighted the difficult conditions in schools for the poor and how these schools face overlapping disadvantages of social conditions, family capacities, school management capabilities, and teacher knowledge.

Concerns have been confirmed in government policy documents and, more recently, in TALIS 2018. The responses of South African teachers to positive statements about the profession, the OECD (OECD 2020, 84) interpreted as "reflect[ing] an overall pattern of dissatisfaction with the profession".

The OECDs conclusion of "an overall pattern of dissatisfaction" may be too strong to apply to the feedback during our interviews. For one, although they certainly had frustrations, there was among the teachers interviewed in Limpopo a generally positive attitude toward the profession and almost all saw themselves remaining in the profession, with significant ambitions for having more influential roles. In all three provinces, there were some committed teachers in these quintile-three schools.

Across all provinces, the most common frustrations were learner motivation, discipline, and knowledge. Unhelpful parental attitudes and a lack of support from the home environment were of almost equal concern. In some instances, this was related to the perception that parents are very young and that children are left with grandmothers who care for them. In some cases, this felt like a lament at the callous absence of support from the teachers' most important partners in supporting learners[17]. In other cases, however, these concerns were connected to the harsh socio-economic challenges in communities and households.

Slightly less common, raised by more than a third of teachers, was curriculum and curriculum change and school infrastructure. One teacher referred to the curriculum as a "straitjacket" and others referred to being forced to teach in a way that did not work for the type of learners they have. Regarding infrastructure, the Eastern Cape feedback was strong in the absence of very basic facilities (such as gates and fences), in Gauteng, about the conditions of classrooms and lack of ICT and media, and in Limpopo, about school toilets (pit latrines). A significant number of teachers teach large classes, in some cases 60 and 70 primary school learners. This makes teaching a challenging task.

A third cluster of concerns, raised somewhat less often than the above, are feelings of teachers being disempowered by the perceived high regard for the rights of children, including the ban on corporal punishment. Earnings came up in about one-third of the interviews as a negative factor, most commonly in Eastern Cape and Gauteng, but not so much in Limpopo. Sometimes this related to the impossibility of securing the necessities of an urban life (motor car, house and school fees) and in other instances to teacher salaries compared to the salaries of what their learners progress to, "doctors and pilots" in one instance.

The least common among the sets of pressures raised were issues of support from partners such as colleagues, management teams, circuits and districts, and trade unions. Quite often, these issues had to be raised by interviewers. Generally, there was not a strong sense of being supported, and, in the Eastern Cape and Gauteng, there was significant disappointment with the extent of support from the department via the district and circuit offices. In Gauteng, there was appreciation for the teacher assistant initiative, part of the Presidential Youth Employment Initiative, and hope that the programme could be repeated and that assistants

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[17] This common lament, evident from the first interviews and coming from all three provinces and in very similar terms, was striking. One potential interpretation is that, rather than reflecting the actual situation, these views reflect blame-shifting for perceived low learner and school performance for which teachers often take the blame. The "tendency to blame others", together with "pervading negativity and apathy" and "seeming lack of agency", in Gauteng schools in the 1990s was described by Christie (1998, 291).

would receive more specialized training. Except for the National Teaching Awards, raised as an inspiration in Limpopo, and the Funza Lushaka bursary scheme, elements of the Integrated Strategic Framework for Teacher Education and Training, such as District Teacher Development Centres and induction programmes, were not mentioned.

The range of pressures on teachers makes their work stressful. Older teachers seem to have adapted to this and are working within these constraints, but with little expectation of improving conditions or results. Among younger teachers, there were contrasting experiences. In Limpopo, we found optimism, but with some realism about challenges, while in Gauteng pressures seemed difficult to handle and young teachers were considering alternatives: changing schools, moving into a circuit or district office or looking for other options. From a Gauteng perspective, at least, the gains from policy (mostly the availability of bursaries and sound training at universities) may be dissipated by pressure as young teachers look for alternatives. The "incipient renewal" of the teaching profession therefore faces significant threats.

Recruitment

Another potential threat to the renewal of the teaching profession is the recruitment and appointment systems. While the policy framework mandates national, open availability of information and a competitive process, this seems to be part of reality only in the Western Cape. Post-level 1 post processes in Gauteng have been moving from fairly localized informal processes (word of mouth, local advertisements and applying to schools) to appointments from provincially compiled priority lists containing bursary holders, teachers in excess and unemployed teachers. While school governing bodies still play a role in making recommendations, they choose from a narrower pool than envisaged in the policy framework.

The experiences of the young teachers interviewed confirmed the informality of many of the recruitment processes. Even for Funza Lushaka bursary holders expecting to receive offers from provinces, the experience was mixed. Some indeed received timely offers, sometimes more than one, and could then share information with fellow graduates not receiving offers. Other Funza Lushaka bursary holders accessed their positions by providing CVs to district offices, approaching schools and responding to school post advertisements on social media.

In only one case, in Limpopo, from a principal, was there reference to political and community "meddling" in schools, but this related more to economic opportunities around schools (selling food to children) than to appointment processes. Unions were mentioned only once with regard to appointment processes in Limpopo, and this was related to the conversion of temporary posts to permanent posts. Some older teachers referred to unfair promotion processes, but there was little detail on the exact nature of the problem.

Thus, the interviews confirmed, to an extent, the importance of informal processes and that the main channel envisaged in the regulatory framework (provincial-level advertisements and subsequent filling of posts) is seldom used in the provinces where the interviews were held. The interviews also did not provide more information on the issues of patronage and corruption in the system, an issue that was not specifically pursued. Little more can be learned about the efficiency of processes.

5.4 Dealing with threats to renewal of the teaching profession: research and policy

Research

Given the importance of teacher motivation and job satisfaction for an effective education system, the attention given to research on teachers' working conditions and well-being in South Africa is erratic and irregular. Except for TALIS, which provides quantitative information, there seem to be no ongoing data and research programmes related to student aspirations, teacher experience and well-being, and appointment and matching systems and processes. National research programmes on teacher aspirations and teacher supply and demand have dissipated. It does not seem as if much progress has been made in terms of the DBE's commitment "to … a clearer emphasis on understanding the problems experienced by teachers ..." (South Africa, Department of Basic Education 2020, 14).

In addition to more research, there is also room for broadening the conceptual and theoretical frameworks. Much of the literature on teacher motivation in South Africa, TALIS, and the conceptual framework used for our teacher interviews focuses on the balance between intrinsic, altruistic, and extrinsic motivation. In addition to questions about conceptual coherence (Richardson and Watt 2006, 31; Leonard 2015), it is not always clear how findings of what becomes lists of motivators assist in formulating strategies for system improvement

One promising direction is to explore the more strongly theoretically founded approach of Watt and Richardson (Watt and Richardson 2007; Watt, Richardson, and Smith 2017; De Clercq, Watt, and Richardson 2022). Another possibility is to explore the identity economics of Akerlof and Kranton which, through the introduction of a wider set of factors influencing choice, assists in understanding some education economics puzzles, such as the highly uneven relationship between school resources and school outcomes. (Akerlof and Kranton 2002b, 1167–68)[18]. In a nutshell, their early answer was that resource use will not be effective when there is a gap between student backgrounds and the academic values that schools strive for, and where schools are not able to invest in a school identity that promotes effective use of school resources (Akerlof and Kranton 2002a, 1198). They indicated that an important omission from their work was the "motivations of teachers and motivators" which would also influence how effective schools could transform resources into outputs.

Both the approaches of Richardson and Watt and that of Akerlof and Kranton bring us closer to the notion of "school culture" and its influence on learning outcomes. Hwa (2020a; 2020b) has drawn attention to how system performance may require congruence between "sociocultural context", which drive "mental models of motivation", and accountability mechanisms that are in place. She focuses on differences between the Finnish system of what can be called a collective care system and the Singaporean individualistic and competitive system. These in a sense define "school cultures". This draws attention to the differences in school culture across countries, regions and schools, and that policy must take cognisance of this.

For the South African case, Soudien (2007, 191) argued that blockages to education reforms and improvement cannot be seen as related to individual teachers but are "social or cultural" problems. A culture of resistance among teachers and learners ("deep reproductive anti-

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[18] One of their reviewers referred to the puzzle of "why school resources do or do not (as often found) affect the returns to schooling".

authority and anti-regulation dispositions of everybody in the school") do not respond well to the reward and punishment instruments of the New Public Management which is seen as "a new version of apartheid's big stick". Perhaps, in Hwa's terms, there is a lack of congruence between the proposed accountability system and "mental models of motivation", which fire resistance.

Earlier South African work on the "culture of teaching and learning" in schools has also pointed to aspects of organizational culture driving continued underperformance (Christie 1998). To oversimplify, breakdown in organisations can lead to psychological responses, such as blaming other parties, which removes the agency of actors and makes cooperation and improvement impossible. Such organisational culture, Christie argues, cannot be changed by directive ("mandated by top-down policies") (ibid 294), but requires participative processes. The key to unlocking these issues, and at the heart the problem of teacher motivation, is to "recognise the complex group and organisational dynamics crippling the work of these schools" (ibid). These approaches promise a more nuanced and policy-relevant approach for teacher motivation.

Therefore, in addition to having a more consistent research programme exploring quantitatively the aspirations, motivations and experiences of teachers, there should also be attention to other approaches to teacher motivation and system efficiency. More attention should be paid to the complexity of the organisational cultures of dysfunctional schools, as in Christie (1998). This approach was also successfully adopted in Von Holdt's work on South African public hospitals (Von Holdt 2010).

Policy

It could be argued that teacher policy and strategy in South Africa responded to threats evident in the 2000s (including low recruitment to training, the HIV/AIDS pandemic and evidence of low levels of learning) and that teacher supply and demand is at this stage on a sounder footing, perhaps mostly because of the rapid expansion of the number of teacher graduates.

Given the absence of systematic research programmes on teacher motivation (and as suggested above, the complexity of organisational cultures in schools), there is not much of a basis for further policy development and good policy will require the prioritisation of research on teachers (as was suggested in the 2020 Action Plan). More continuous and detailed monitoring of the system is also required.

Additionally, there is a need to examine the comprehensiveness of policies and strategies. The 2011 Integrated Strategic Policy Framework identified concrete steps to improve teacher education and development, including strengthening recruitment and support. This may have helped to improve the situation. However, there has not been good monitoring of its implementation and impact. Measured against Beteille and Evans' standard of "teacher policies that are designed and implemented in a manner that attracts high-ability individuals and prepares, supports, and motivates them to become high-performing teachers", South Africa still has some way to go.

Annexure

Qualitative analysis and school-based interviews

The qualitative analysis used information from interviews with principals and teachers in a limited number of primary schools. The focus on primary schooling is in line with Resep's emphasis on the importance of early grade reading and solving system problems in the early grades and builds on earlier work that found significant divergence in class size between primary schools with the same pupil-teacher ratio. Primary schools face significant pedagogical complexities in teacher allocation.

The aim was not to achieve statistical representativeness through the selection of schools but to identify potential themes on appointment, matching, and utilization raised by teachers. Themes and findings are interpreted in the context of local and international literature, including findings based on quantitative assessments from surveys, such as the OECD's Teaching and Learning International Survey (TALIS), most recently undertaken in South Africa in 2018.

Principal interviews

Interviews with principals focused on four elements of post-provisioning systems.

- Provincial allocation of posts to schools based on the published post-provisioning model;
- Appointment processes, including the advertisement of vacant posts, the application, shortlisting and interview process, the final appointment by the head of the provincial department and, where relevant to the school, the operation of redeployment of teachers in excess at school;
- The process of matching teachers to specific teaching and other roles in the school and the resulting class sizes;
- Monitoring and evaluation of teachers and their sense of teacher motivation and commitment.

The main interest is, first, in the understanding of school principals of the rules governing key staff provisioning and utilisation processes related to teachers (which can be referred to as teacher provisioning policy) and how those rules are implemented and processes managed, and second, on the impact of the policy and implementation on the availability of adequate numbers of teachers in schools. Initial questions in the four areas were set out in an interview schedule and were followed by relevant questions of clarification and motivation.

Teacher interviews

Interviews with teachers (as reflected in the accompanying interview schedule) focused on what motivated them to become teachers, whether their expectations in this regard became a reality on appointment, and about shifts in motivation over time. Second, questions focused on career plans, specifically on whether they intended to continue as teachers for the future, whether they had any specific career plans, and the underlying factors or motivations. We asked teachers about their experiences with the appointment processes. Starting with questions from a loosely structured interview schedule, issues and responses were probed further.

After the interviews, they were transcribed, and responses were classified according to the main issues identified.

The schools and teachers
The focus is on primary schools because this is where large classes are a common occurrence and to explore potentially further some of the complexities of managing learning in earlier school phases.

Class sizes (one potential indicator of teacher shortage) relative to LE ratios differ between provinces and schools within provinces. In other words, we found schools with comparable LE ratios but different class sizes. Moreover, across provinces, there are provinces with lower average class sizes (termed "efficient" provinces) than other provinces at similar LE ratios ("inefficient" provinces). Hence, the sampling included one more "efficient" province (Gauteng) and two less "efficient" provinces (Eastern Cape and Limpopo).

Within provinces, schools of differing "efficiency" in terms of class size relative to the LE ratio were selected. This provided diversity in the sample and the potential to have a number of different explanations (drivers) for class size. Schools in urban settings, informal settlements, and rural schools were also included. Selection was from only quintile three schools, so as to avoid unnecessary diversity in the small sample.

The dataset and selected schools
The dataset used was described more extensively by Gustafsson (2022a). In short, we used administrative data sources on learners and schools[19] to generate for primary schools (including only Grades 1-7) a dataset providing data on:

- number of learners in schools (for 2015 and 2020, with the exception of the Eastern Cape for which 2020 data were not available)
- number of teachers in 2015
- LE ratio in 2015
- crowdedness of schools in 2015 and 2020, measured as the proportion of learners in classes exceeding 40 (again, with the exception of Eastern Cape for 2020).

For each of the three provinces, data were extracted from quintile-three schools in the selected school districts. The data were as follows:

- In Eastern Cape, 67 of the 507 quintile-three schools are in Buffalo City and Amathole West districts.
- In Gauteng, there are 18 of the 57 quintile-three schools in the Johannesburg Central and Johannesburg East districts.
- In Limpopo, there are 77 of the 92 quintile-three schools in the Capricorn North and Capricorn South districts.

We sorted the schools for which we had all the required data in each province from the highest to lowest LE ratio and inspected the data. Schools with similar LE ratios, but different class sizes, were selected. Two sets of three schools were identified for each province to allow for replacement if the selected schools were unavailable. In each grouping, one large school and two medium or small medium schools were selected. The schools selected and their basic characteristics are listed in Table 1.

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[19] Relevant data came from the Learn Unit Record Information and Tracking System (LURITS) for 2020 and 2015 and from the 2015 SNAP Survey

Table 2 School selected for interviews with teachers

Eastern Cape				
School location	Description	Learners 2015	LE 2015	Crowdedness (% in 40+ classes) 2015
EC1-Small Town, township	Medium school, low30s LE, low crowdedness	529	33.1	17.1%
EC2-Large Town, former HoR	Large school , low30s LE, no large classes	1035	30.0	0.0%
EC3-City, township	Medium school, low 30s LE, higher crowdedness	433	33.3	88.8%
Gauteng				
School location	Description	Learners 2015	LE 2015	Crowdedness (% in 40+ classes) 2015
GP1-Soweto, smaller language focus	Small/medium school, high LE, low crowdedness	266	37.9	20.7%
GP2-Soweto, smaller language focus	Small/medium school, high LE, medium crowdedness	265	37.3	52.3%
GP3-Midrand, including informal settlements, 4 language streams	Large school, high LE, high crowdedness	1927	37.1	100.0%
Limpopo				
School location	Description	Learners 2015	LE 2015	Crowdedness (% in 40+ classes) 2015
LIM1-City, township	Large school; relatively good LE;high crowdedness	931	30.0	100.0%
LIM 2-Small town, township	Small/medium school; 100% in large classes 2020; lower LE	386	29.7	100.0%
LIM3- Small town, township	Medium school ; good LE; medium crowdedness	435	31.1	46.3%

Source: Department of Basic Education, Learner Unit Record Information and Tracking System (LURITS), 2015, and SNAP Survey. Extracted and analysed by Martin Gustafsson. See Gustafsson (2022a)

Teacher characteristics

Schools were requested to provide teachers from different primary phases and include some young teachers. The characteristics of the interviewed teachers are provided in Table 2. Twenty-two of the 27 teachers interviewed were women, and seven (all women) were young (i.e., 30 or below). Six of the seven young teachers studied with support from Funza Lushaka Bursary.

Table 3   *Teacher characteristics*

Age	Eastern Cape	Gauteng	Limpopo	Total
20-30 (Young)	0	4	3	7
31-50 (Middle-Aged)	5	1	3	9
51-65 (Older)	4	4	3	11
Total	**9**	**9**	**9**	**27**
Gender				
Women	9	8	5	22
Men	0	1	4	5
Total	**9**	**9**	**9**	**27**
Phase				
Foundation	5	4	5	14
Intermediate	2	3	3	8
Senior	2	2	1	5
Total	**9**	**9**	**9**	**27**
Bursaries				
Funza Lushaka holders	0	4	2	6

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