Education in Transition: From Policy to Practice in Post-Apartheid South Africa, 1994-1999

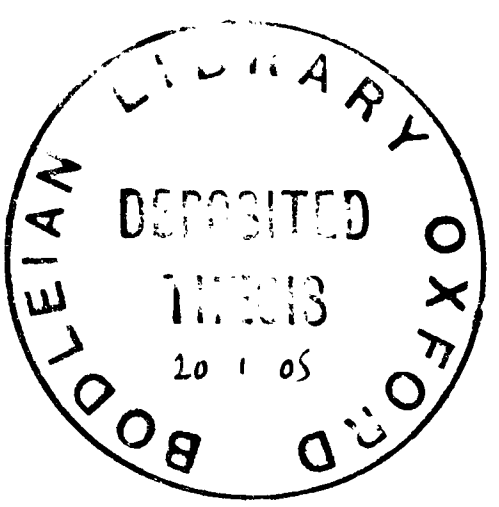
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ABSTRACT

The purpose of this research is to try to understand why educational restructuring since 1994 appears to have failed to achieve the government's stated objectives of development, equity, participation and redress for large sections of South African society. As the educational inequalities of the past appear to prevail beyond the arrival of the first democratic government, the hypothesis that little has fundamentally changed is explored.

Although the study is firmly focussed on the period between 1994 and 1999, the legacy of the apartheid years is also examined to ensure that the research is firmly rooted in its historical context. The key area for analysis within a qualitative paradigm is the dynamic which exists between central government and its key role in planning educational reform and in policy formulation, and the provincial administrations, in whom the major responsibility for policy implementation and for effecting change on the ground, is vested.

Local realities, dynamics, and constraints on the ground are explored in some depth in one of South Africa's nine provinces: the Eastern Cape. Access to the Eastern Cape's Department of Education and Culture was successfully negotiated in October 1997. As a consequence a total of 40 interviews were held with a mix of previous Ministers of Education and Culture, retired and serving Senior Civil Servants, ex members of two transitional provincial bodies, senior representatives of the main teacher unions and non-governmental organisations, school principals and school teachers. The data collected as part of this study was analysed using the grounded theory approach. The analysis indicates that educational change in the Eastern Cape will not come quickly, and that for many who were previously disadvantaged under the apartheid system little has fundamentally changed in the first five years of the new democratic South Africa.

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ABBREVIATIONS AND ACRONYMS

ABET	ADULT BASIC EDUCATION AND TRAINING
ANC	AFRICAN NATIONAL CONGRESS
CEREP	CENTRE FOR EDUCATION RESEARCH, EVALUATION AND POLICY
CICSA	CISKEI CIVIL SERVANTS ASSOCIATION
COLTS	CULTURE OF LEARNING AND TEACHING AND SERVICE
COSAS	CONGRESS OF SOUTH AFRICAN STUDENTS
COSATU	CONGRESS OF SOUTH AFRICAN TRADE UNIONS
DET	DEPARTMENT OF EDUCATION AND TRAINING
ECD	EARLY CHILDHOOD DEVELOPMENT
EDO	EDUCATION DEVELOPMENT OFFICER
EMD	EDUCATION, MANAGEMENT AND DEVELOPMENT (TASK TEAM)
EMIS	EDUCATION MANAGEMENT INFORMATION SYSTEM
ETTT	EDUCATION TRANSITIONAL TASK TEAM
GEAR	GROWTH, EMPLOYMENT AND REDISTRIBUTION
GNU	GOVERNMENT OF NATIONAL UNITY
HSRC	HUMAN SCIENCES RESEARCH COUNCIL
MEC	MINISTER OF THE EXECUTIVE COUNCIL
NCSNET	NATIONAL COMMISSION ON SPECIAL NEEDS IN EDUCATION AND TRAINING
NCESS	NATIONAL COMMITTEE ON EDUCATION SUPPORT SERVICES
NECC	NATIONAL EDUCATION CO-ORDINATING COMMITTEE
NEHAWU	NATIONAL EDUCATION AND HEALTH WORKERS UNION
NEPI	NATIONAL EDUCATIONAL POLICY INVESTIGATION
NGO	NON-GOVERNMENTAL ORGANISATION
NQF	NATIONAL QUALIFICATIONS FRAMEWORK
OBE	OUTCOMES-BASED EDUCATION
PSA	PUBLIC SERVANTS ASSOCIATION
RDP	RECONSTRUCTION AND DEVELOPMENT PROGRAMME
RESA	RESEARCH IN EDUCATION IN SOUTH AFRICA
RETF	REGIONAL EDUCATION AND TRAINING FORUM
SACHED	SOUTH AFRICAN CHURCHES HIGHER EDUCATION DEVELOPMENT TRUST
SACHES	SOUTH AFRICAN COMPARATIVE AND HISTORY OF EDUCATION SOCIETY
SADTU	SOUTH AFRICAN DEMOCRATIC TEACHERS' UNION
SAPSA	SOUTH AFRICAN PUBLIC SERVANTS ASSOCIATION
SAQA	SOUTH AFRICAN QUALIFICATIONS AUTHORITY
SED	SPECIAL EDUCATION DIPLOMA
SEN	SPECIAL EDUCATIONAL NEEDS
SMT	STRATEGIC MANAGEMENT TEAM
VSP	VOLUNTARY SEVERANCE PACKAGES

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I would also like to thank the Eastern Cape Department of Education for their approval to this research being undertaken. In this regard I would like to especially thank Mr Eldred Fray and Mr Chris Mangco for the assistance they gave me during my visits to South Africa. Finally I would like to thank all those school principals and teachers, politicians, civil servants and union officials in the Eastern Cape who cooperated with this study and in so doing helped me to understand the events which occurred in the Eastern Cape from 1994 to1999.

This thesis is dedicated to my parents, Peter and Ruby who left apartheid South Africa in August 1956 to give their children the educational and life opportunities they never had. We will never forget the hardships they endured for our sake.

INTRODUCTION

RATIONALE FOR THE STUDY

I believe that within the broad context of radical change in South Africa since 1994 there exists the need and the opportunity for a qualitative research study, which examines the work of central and local government to achieve redress for large numbers of people marginalised during the apartheid era. It is the task of this thesis is to describe the reality of transition in one of the provinces of South Africa, and to analyse it from the perspective of local government. I believe a study of this nature can provide an opportunity for central government, and policy makers in particular, to witness and better understand the realities of policy implementation, and to raise awareness in the minds of senior government officials that government policy needs to be contextualised, relevant, and above all, capable of implementation.

This thesis approaches the question of policy implementation and the delivery of education services in the Eastern Cape between 1994 and 1999 against a backcloth of huge expectations, and a plethora of government policy. As a part time student and a single researcher, I decided to limit my study to this five year period, which was principally, a recognition of the modesty of my own resources rather than an unwillingness to extend the study further. The study, itself, is primarily the result of on site research in South Africa over a period of two years: 1999-2000. During this period I carried out 40 interviews and interviewed 43 people in total. In three of the interviews my primary interviewee was joined by working colleagues. In examining this topic, I have used the data collected from

these interviews as well as primary textual information collected from a variety of local, national and external sources.

Whilst the broad context of radical change in South African education since 1994 forms the background to my research, it is my contention that five years on, South African education appeared to be in crisis. During the apartheid era it was a crisis of legitimacy. In 1999 it appeared to be a crisis of competency, effectiveness and efficiency, which seemed to suggest that little had changed during the lifetime of the first parliament for the majority of the non-white population.

STRUCTURE OF THE THESIS

This thesis is being submitted as the final part of the doctoral research process. It consists of seven chapters. The thesis includes an abstract, an introduction and a first chapter outlining the nature and purpose of the study, as well as a review of three scholarly works which provide an insight into the polemics of educational change in South Africa. Chapters three to six document the periods of the different administrations from the provincial transitional bodies pre-1994, through to the establishment of the education departments of 1994, 1995 and 1998.

The methodology chapter, (chapter 2) includes, *inter alia,* a section on the rationale underpinning my choice of research methods and a section on how the data was analysed using the 'Atlas ti' software package. A literature review is not included in this thesis as a separate chapter, as I believe a more appropriate way

of covering the literary ground may be achieved by reviewing the work of others within the discourse of each chapter.

Chapter 3 contextualises the study within a socio-economic, historical and educational framework. A significant part of this context, much of which militates against educational change in the Eastern Cape, is the province's rural character, and the isolation and poverty of its schools, the vast majority of which serve rural communities. Although there is a focus on farm schools in this chapter, the writer's reference to rural schools throughout this thesis is intended to be generic, to include all combined, single teacher schools found on farms and in the rural areas of the province. Whilst much of this chapter reflects the legacy of apartheid, it also traces the historical events that led to the establishment of the first democratic education administration in the Eastern Cape, and describes the work of the provincial planning forums which were established pre-1994 in readiness for the eagerly anticipated change in government.

Chapter 4 considers the challenges facing the department of education in the Eastern Cape following the advent of democracy in South Africa. It continues the historical analysis by examining how the first department of education responded to the major challenges facing the province. Specific reference is made in this chapter to the nature and meaning of transition, to the work of the first department of education to create a culture of learning and teaching, and to the response by many black teachers who were unprepared for the new liberal environment, and who ignored the call to return to work. The difficulties faced by the new department and school principals in promoting a culture of learning and

teaching in schools was further undermined by the largest teacher union, the South African Democratic Teachers Union, (SADTU) and by the inability of education officials to intervene in an authoritative manner in conflict situations in schools. The involvement of SADTU as a significant player in the process of redress and participation in the Eastern Cape is explored in this section, as is the process by which many education officials were appointed to the new department. Many were absorbed from the former departments of education where ineffective administration, deliberate inefficiency, corruption, nepotism and patronage had been prevalent. These issues and the lack of capacity at nearly every level of the service - infrastructure, financial resources, leadership, management systems, technical skills, and teacher qualifications - are examined in this chapter.

Chapter 5 focuses on the key polemic of this research, namely the formulation of policy and the implementation of it, as a function of central and local government respectively. This chapter comprises two parts. The first part continues the historical discourse from the dismissal of Ms Hoosain, through the period of Mrs. Balindlela's and Professor Mayatula's administrations from February 1995 to April 1999. There is a particular focus on the financial legacy of the Balindlela administration which had the effect of imposing a strait-jacket on the development of education in the Eastern Cape from 1997 to 1999. It was within this unstable arena of local bureaucracy that policy was handed down by central government to the provincial administration.

The popular belief that policy makers lacked both a proper understanding of the realities on the ground, and failed to appreciate the scale and nature of the

challenges facing the provincial administrations is explored in the second part of this chapter. The section reviews policy documents as well as national campaigns and government reports which were to be the government's building blocks for the new education system. Issues relating to policy overload, the relevance of government policy and the readiness of the province to implement these policies are considered as part of the dynamic of policy reform/policy implementation in the Eastern Cape. One specific area of policy contestation is considered in this chapter. It explores the shift from transmission models of teaching and learning to Outcomes-Based Education (OBE) and charts the sudden emergence of OBE in South Africa in 1996 from its American roots to its disputed introduction in South African schools (Grade 1 classes only) in January 1998 and to its eventual partial demise in July 2000. This section will describe the difficulties faced by the Eastern Cape Department of Education in implementing this major curricular change. It will focus on the debate which unfolded on racial lines, and on the concerns and difficulties faced by black teachers in understanding and implementing a complex and unfamiliar curriculum, and on the absence of a teacher training programme and on the lack of resources.

Chapter 6 considers the key issues of access to schooling, participation, equity and redress within a democratic South Africa and examines whether the lives of those people marginalised during the Apartheid era have changed significantly. There is a specific focus in this chapter on the access issue from the perspective of the province's special schools and specialist services. Although there is evidence of a growing move towards the inclusion of special needs

children in mainstream schools, the issue confronted here is the extent to which black children with special educational needs are being provided for in *any* school setting in the Eastern Cape. Specific attention is paid in this chapter to issues relating to funding, to the training of teachers and to the capacity of the support services. In terms of redress, two specific instruments are explored: the redeployment of teachers and the redistribution of funding to schools. There is also a focus on the department's drive towards decentralisation and its support of school governing bodies.

In the final chapter of the thesis, Chapter 7, I return to the education crisis in the Eastern Cape, to the apartheid legacy and to the total underestimation at all levels of government of the task of transformation. I confirm that the research findings substantiate the hypothesis that national and local government will be slow to achieve redress for large sections of the Eastern Cape community. Possible causes are proposed, amongst which a lack of effective and stable leadership, and a lack of administrative capacity are prominent. The chapter continues with an interpretation of the results of my South African field experience within the paradigm of existing theories of development, and with an examination of Jonathan Jansen's (2001) theory of political symbolism which seeks to explain the non implementation in South African educational reform by asking whether government policy was *actually* intended to change practice. The chapter concludes with a summary of the major achievements and shortcomings of the Eastern Cape department of education during the transition from its authoritarian past to its democratic future.

CHAPTER 1

NATURE AND PURPOSE OF THE STUDY

The purpose of this study is to try to understand why educational restructuring since 1994 appears to have failed to achieve the government's stated objectives of development, equity, participation and redress for large sections of South African society. It will do so by examining and documenting the challenges, achievements and shortcomings of one of the new provincial departments of education in South Africa, as it struggled to deliver a single education service for all its people which could begin to redress the decades of inequity. It is my contention that the legacy of apartheid education in the Eastern Cape was so ingrained, that the education crisis of the 1980s would continue into the era of the first democratic government, and that the new provincial Department of Education would be slow to achieve redress for the marginalised communities of the Eastern Cape.

RESEARCH QUESTIONS

The main research question to be pursued in this study is:

- *has educational restructuring since 1994 achieved the government's objectives of development, equity, participation and redress for the black population of the Eastern Cape?*

It is pursued through two subsidiary questions, both of which have been reviewed and subsequently revised as the study has developed. These questions were the main vehicles through which an attempt was made to discover and understand the actual events which occurred, both within the Department of Education and

within the broader Education Service in the Province of the Eastern Cape post-1994. They are:

- *what were the challenges facing the Department of Education in the Eastern Cape and to what extent did these challenges impact on the delivery of the education service?*
- *how did the Department of Education in the Eastern Cape improve access to schooling for those communities marginalised during the Apartheid era, and begin to redress the educational inequalities of the past?*

ORIGINS AND PROSECUTION OF THE STUDY

This study has several origins: historic events which took place in South Africa in the early 1990s; a short study visit which I undertook in South Africa in 1992; as a result of planned developments (Oxfordshire County Council's links with the Provincial Administration in the Eastern Cape); in a paper by De Clercq (1997); chance meetings and conversations with key players in the provincial governments and non-governmental organisations, and with key researchers working in the field. In particular, during the 10th World Congress of Comparative Education in Cape Town in July 1998, I was able to benefit considerably from discussions with other researchers about their work:

> *in any active area of inquiry, the current knowledge base is not in the library - it is in the invisible college of informal associations amongst research workers....the best introduction to the current status of a research area is close association with advisers who know the territory.* Locke et al., 1993, pp. 48-49.

Whilst I believe that I am in a better position than most to take forward this research due to my familiarity with key players in the Eastern Cape provincial government and local non-governmental organisations, it became apparent during two of my four planned visits to the Eastern Cape in April and August 1999, that

there was little prospect of my field work being undertaken if I continued to rely on short visits of two to three weeks to South Africa, organised to tie in with my annual leave arrangements. It therefore became increasingly evident that I would need a prolonged stay in South Africa to continue my data collection, and ideally to undertake the analysis of it. Upon my return to the UK in September 1999, I began negotiations with my employer to take an extended period of unpaid leave from January to August 2000, to carry out my field work in South Africa. An agreement was subsequently reached with the Chief Education Officer and the Spokespersons of the three main political groups on the County Council's Education Committee to release me from my employment for eight months. I subsequently arrived in South Africa on 4 January 2000, carried out my research, and returned to the United Kingdom on 27 August 2000. Upon my return to work in September of that year I was seconded to a small officer team to oversee the reorganisation of the school system in Oxford City from three tier (first, middle, and upper schools) to two tier (primary and secondary). During the lifetime of the schools reorganisation project, which was completed in September 2003, I had little opportunity to complete my data analysis or to commence the writing up of my thesis. In October 2003 I took a further period of leave (3 months) to return to my doctoral studies. This enabled me to gather the momentum necessary to submit in July 2004.

THEORETICAL PERSPECTIVES

This will be a descriptive analysis from which it is expected that a theory or pattern will emerge following the data collection and data analysis stages of the research. Although a study of this nature may provide insight into a broad range of concerns shared by developing countries, I do not foresee as an outcome of this study an end product which will seek to generalise the findings to other contexts either within South Africa or the developing world in general. Instead I will be seeking to formulate an interpretation which I expect to be unique to the Eastern Cape. It is probable that any theory which emerges from the study will have been grounded in the actual data collected and that there will be evidence of a cause-effect relationship. As South Africa entered its transition to democracy at a time when the processes of globalisation were intensifying, it is also probable any theory which emerges will be associated with neo-liberalist, post-modernist, partial dependency, and democratisation theories of development.

REVIEW OF LITERATURE

A review of scholarly literature has been included, where possible, in each of the chapters of the thesis where it has been used to contrast the results which have emerged from the data analysis. As the emphasis in my research methodology is on the inductive, I believe that the literature review should be 'connected' to the rest of the thesis in this way.

> *In qualitative research, the literature should be used in a manner consistent with the methodological assumptions.* Creswell, 1994, p. 21.

> *I expect my students to know the relevant literature, but I do not want them to lump (dump) it all into a chapter that remains unconnected to the rest of the study. I want them to draw upon the literature selectively and appropriately as needed in the telling of their story.* Wolcott, 1990, p. 17.

However, at this early stage in the thesis, I do wish to draw upon the work of several South African writers, (Kallaway, Kruss, Badat, Chisholm, De Clercq, Carrim and Jansen) and others who have institutional links with South Africa, (Morrow and King) to inform the reader of the ongoing dialogue on education in transition in South Africa. These works are brought together in three texts: *Education after Apartheid - South African Education in Transition,* edited by Kallaway et al., 1997; *Vision and Reality - Changing Education and Training in South Africa,* edited by Morrow and King, 1998; and *Implementing Education Policies – The South African Experience,* edited by Sayed and Jansen, 2001.

There are contributions in these books from a range of independent researchers who have focused on different aspects of educational transition. Whilst these books cover relatively short periods of time (1990-1996 [Kallaway et al.]; 1994-1998 [Morrow and King]; 1994-1999 [Sayed and Jansen] they have been written during a time of rapid change and continuing development in the South African educational system.

Although the concern of many of the contributors to these texts is with analysing the tensions which exist between the development of policy and the challenge of implementation, their work reflects different concerns about the creation by policy makers of new crises within the country's schools and teaching profession. These concerns range from the need for redress from apartheid and the fostering of the democratic process, concerns about the effects of globalisation

and the perceived loss of cultural identity, the need for policy coherence in education and training, and concerns for the social and economic needs of the poor. The following review of these three texts is intended to provide an overview of these differing concerns.

The significance of the three texts is that they have attempted to analyse comprehensively the current situation and sought to assess the progress of the National Department of Education. The ground covered in the three books in reviewing the reform process is vast and is reflective of the scale and scope of the transformation process in South Africa. At a practical level their work has been valuable in that it has given me an insight into current concerns and debates, and into the challenges, and the events which have taken place in education in South Africa. More significantly, some of their work covers ground which I believe is relevant to my research as they include papers which were written around the policy formulation/policy implementation dynamic and as a response to the government's perceived success in meeting its stated objectives of improving access, redress and equity. The coverage given in this chapter to the first of these works, (by Kallaway et al.) is narrower than the other two works, as some of the ground covered in this book is reflected upon as part of the final chapter.

Education After Apartheid - South African Education in Transition, by Kallaway et al., (1997), is a collection of 10 papers divided into 2 sections. In section 1: 'Globalisation and Transition in South African Education,' several writers, Badat, Chisholm, Fataar and Kruss

> *attempt to raise significant questions about South African education in a global context by exploring the tensions between social democratic politics and the prevailing politics of the market.* Kallaway et al., 1997, p. 2.

The editors identify this tension as the key problem for the new government:

> *From the politics of race and apartheid, there is now a clearly emergent division between free enterprise politics/pro-marketers/supporters of privatisation and those who support soft and hard forms of politics of redistribution.* Kallaway, 1997, p. 39.

They argue that there is a need to balance the dual priorities of providing preconditions for economic growth and providing social upliftment, equitable redistribution and political stability.

One of the contributors to this section, Glenda Kruss (1997) addresses the complexities of education policy in the Western Cape, from the perspective of centre-policy relations. In the Western Cape the Nationalist Party have had political control since 1994, and the education system is well resourced relative to other regions. Here the tension relating to the free market and social democracy is overlaid by the tension surrounding the lack of definition in policy documents about governmental and provincial responsibilities. This lack of definition was exploited by the Nationalist Party in 1995, who challenged the government for failing to produce a coherent plan to provide for and extend schooling for all.

> *The case of the Western Cape has underscored the significance of ongoing hegemonic contestation shaping the agenda of (national) policy and educational restructuring.* Kruss, 1997, p.10.

In section two: Policies in Transition, there is an examination by Christie, De Clercq, Greenstein, McGrath and Donn of the dynamics and processes of

transition and transformation as played out in policy at a number of levels. Issues to do with the integration of education and training, and the government's emphasis on curriculum policies aimed at training children for economic competitiveness rather than democratic citizenship are explored. Greenstein argues that the country's curriculum policies should be based on:

> *the reality of South Africa as a multi-cultural, multi-ethnic and multi-racial society, part of the African continent,.....This means that goals such as education for democracy, improved scientific skills, the integration of education and training, and the encouragement of civic responsibility, are to be conceptualised and implemented against this background.* Greenstein, 1997, p. 141.

McGrath's examination of the ongoing development of the National Qualifications Framework (NQF) leads him to conclude that there is little prospect of either the NQF breaking down barriers between education and training, or the widespread adoption of an integrated education and training system throughout South Africa.

De Clercq questions whether education policy-makers in South Africa have sufficiently addressed the realities of economic life alongside historical commitments. It is her view that there is a need for policy makers to give greater centrality to issues of implementation.

> *South African policy work will therefore benefit significantly if it roots itself more firmly in local realities, dynamics and constraints on the ground, and if it promotes a dialogue and debate among the social actors involved at all the different levels of policy-making.* De Clercq, 1997, p. 166.

Vision and Reality, Changing Education and Training in South Africa by Morrow and King (eds) is a collection of 20 papers divided into five sections:

- Policy and Implementation: Rhetoric and Reality;
- Integrating Education and Training;
- Transforming Professional Teacher Education;
- Changing Teaching and Learning Practices in Adult and Higher Education;
- Diversity and Social Cohesion in Education.

This book which is the outcome of institutional collaboration between the Universities of the Western Cape and Edinburgh endeavours to take

> *a step back from the polemics of the day and reflects carefully and critically on the multiplicity of influences changing education and training systems in South Africa. It takes up several of the major themes which can be seen as emerging and re-emerging in a variety of discursive contexts.* Morrow and King, 1998, p. xv.

Section 1 touches on some of the most challenging issues in South African education and training. These concerns include equity, access, inclusion, quality, professional morale and the transition to work. As the government reforms roll forward, the authors state that

> *there is a particular need for research and policy constituencies to face up to a series of very difficult questions that go to the very heart of the planned reform process. The first of these concerns differentiation versus uniformity. It is understandable, given South Africa's bitter history of separate and unequal curricula for different groups, that the impetus of reform should be towards integrated systems of education and skills training, open to all.* Morrow and King, 1998, p. 2.

In this section, the authors raise some fundamental questions about how the South African nation can best address some of the massive deficits in skills and knowledge, and ask whether the new curriculum will bring urban black schools back into the mainstream where the culture of teaching and learning has been undermined by almost 20 years of struggle and boycotts, and where morale

and student commitment is low. They contend that it is more likely to be accommodated by schools that were not directly involved in the struggle, and question whether a single national curriculum model will provide a remedy for the special requirements of the rural poor.

Two further, related threads running through this section are the recognition that the government needs urgently to secure a commitment from across the population as a whole, to the re-categorisation of levels and processes of learning which are part of the curriculum and qualification reforms, and that research on education and training will need to be refocused, so that the culture of learning, outcomes-based education and learnership are fully analysed and the findings disseminated.

The emphasis in the chapter by King is on policy coherence in education, training and enterprise. King sees the need for policies concerned with human resource development in schools, higher education and training institutes, to be reinforced by policies in employment and enterprise development. King's focus is therefore on the development of an inclusive policy for education, training and enterprise, and with policy coherence across the government departments of education and labour. King argues that there should be a single national system of new learnership covering the entire spectrum of productive work in South Africa. King believes that it is too early to be clear how the government's policies on education, training and enterprise are being progressively implemented, but at the level of policy coherence, he believes there are grounds for concern. His concern stems from the African National Congress (ANC) /government's perceived policy

shift since 1993 when the ANC/ COSATU 1993 policy document entitled *'Framework for Life Long Learning'*, appeared to point the way towards a mechanism for educational and employment mobility, which would cover formal industry, self employment and development projects. The framework paper stated that a web of institutional arrangements will be needed to give support to communities and individuals who generate their own employment and that appropriate training would be made available which would be accredited as part of the new national system. Target groups were identified such as: women, rurally based groups and the disabled. This provision was projected again in the ANC's Policy Framework for Education and Training, 1994 which raised expectations for a unified Ministry of Education and Training. However, in March 1995, the White Paper on Education and Training signalled the government's intention to focus on restructuring the education system rather than provide it with wider linkages to the economy and the labour markets. Although there was collaboration between the Ministries of Education and Labour between 1994 and 1997 on the National Qualifications Framework, the two departments remained separate. The inclusiveness of training, education and the economy, evident in the Framework for Lifelong Learning in 1993, and sought by King was lost.

For Kallaway and other writers (King, Kruss and Greenstein) the government's policy approaches appear to ignore the links between the provision of education and the social and economic needs of the rural poor.

> *The exclusive emphasis of the new policy formulations on the problems that arise from the global economy and the need for particular kinds of 'human resource development' that will encourage effective integration into the global economy effectively ignore the 80% of the population whose lives will never be part of the global economy in any direct way and whose skills will be used in the village, the farm, the local factory or plantation.* Kallaway 1998, p. 21.

Kallaway continues the criticism of government policy by his assertion that:

> *the re-ordering of the international discourse on education in the 1990s has led to an alarming trend of defining the South's educational objectives in terms of the global discourse in the North... A major hallmark of these educational reforms is their orientation towards 'human resource development' capable of delivering 'successful' economic systems akin to those that are held to be characteristic of the newly industrialised countries of the Pacific Rim... subordinating many countries of the South to a new domination of educational codes and assumptions imported from the industrialised world. The globalisation of the language and practices of the qualifications frameworks, learning profiles and outcomes-based education...now constitute a new international and almost hegemonic set of policies and practices. These are defended as being somehow intrinsic to the extension of democratic rights to the poor of the Third World, and the key to economic freedom in the context of the global economy. A major aspect of these new formulations of policy is that they represent the epitome of technicism in the field of education.... They also reflect a behaviouristic notion of educational outcomes. These proposals often emerge in the form of a private language which can only be accessed by a limited number of officials and innovators, leaving the vast majority of educators, parents and students disempowered and disabled in a time of diminishing resources and dwindling morale in the educational sector in Africa.* Kallaway, 1998, p. 20-21

The backcloth to this work by Kallaway is the tension between equity and growth, and greater competitiveness and redistribution. The ANC government has shown a strong obligation to develop policies for redress and at the same time espoused the need for liberation and export – led industrialisation. In September 1994 the White Paper on the Reconstruction and Development Programme (RDP) was published. It was intended to restructure the economy and alleviate the legacy

of poverty and inequality. Yet after only nineteen months the RDP office was wound up.

Section 2 is given over to the integration of education and training, in which Donn explores the emergence of the new qualification frameworks in three countries: New Zealand, Scotland and South Africa. She argues that these frameworks are firmly located within global economic and political contexts, within an international policy climate characterised by 'market rules of engagement'. She questions the efficacy of this approach given South Africa's need for social and educational transformation. Groener interrogates the role played by the trade union movement in shaping the nature of the National Qualifications Framework and casts her work around the debate over socialist and capitalist models of educational reform. Kruss questions whether teachers can really see themselves as stakeholders in an open, transparent and participatory policy process, when the reality is of a changing curriculum and pedagogy, in an under-resourced context. McGrath echoes many of these concerns as he considers the difficulty South Africa will have in moving from principles of policy to detailed programmes of action. Breier highlights a particular dilemma for the developers of the National Qualification Framework as her research identified that the alleged equivalence between informal and formal learning may not be achievable in practice or even desirable.

Section 3 focuses on the transformation of professional teacher education. Brian Gray points to the gap between curriculum intent and curriculum in practice. In his view it will be difficult for even the most experienced of teachers

to implement the new Curriculum 2005, not to mention the vast majority who teach in difficult circumstances, often with minimal facilities, support and training.

Section 4 is given over to the need to change teaching and learning practices in adult and higher education. Entwistle compares the changes in higher education in Britain with the conclusions of the South African government's Draft White Paper on Higher Education of 1996. He identifies the kinds of learning that will be required of future graduates in both countries. The subsequent chapters summarise a series of innovative approaches to teaching carried out at the University of the Western Cape.

Section 5 considers the role of education in promoting respect for cultural diversity in the building of an equitable and cohesive society. Morrow mounts a case for multiculturalism, insisting that only a multicultural approach to education can equip citizens for the complexity and fluidity of personal identity in the modern world. Desai and Van der Merwe address the policy issues which arise from the need to promote English as a global medium of communication whilst validating African languages in a democratic South Africa. They emphasise linguistic inclusion as a prerequisite to full citizenship. Meerkotter is concerned about how this can be achieved in practice, by teachers in under-resourced schools, within the constraints of particular social conditions. In her view there is a need for teachers to show respect for the learners' cultural identity and to include their cultural learning resources in a shared educational experience. Jonathan believes that it is social inequity, not cultural diversity, which threatens

social cohesion, and suggests that pluralism is a divisive problem rather than a unifying shared condition.

Implementing Education Policies – The South African Experience by Yusef Sayed and Jonathan Jansen (eds), 2001, is a review of the relationship between policy and practice in South African education since 1994. It is, moreover, an attempt to understand policy implementation – its problems, politics and possibilities in the context of a state in transition. What distinguishes this book from other texts is that it constructs the study as a dialogue between policy makers and academics, between government officials and policy analysts, between politicians and practitioners – it is therefore an attempt to further the reader's understanding of the dilemma of policy implementation from the respective worlds of politicians, policy makers, policy analysts and practitioners.

The book first explores the origins and evolution of policy in South Africa. Jansen outlines the historical antecedents that shaped policy before the election of 1994 and identifies the main players in the development of policy. Manganyi then evaluates the ways in which policy was made and contested during the 1994/1999 period, reflecting on his involvement as the then Director General of National Education. Nzimande and Mathieson provide a political narrative about policy making, its struggles and contestations, from within parliament from their perspectives as Chair of the Parliamentary Portfolio Committee on Education and Parliamentary Researcher respectively.

The second section elucidates the basic concepts and their contested meaning which shaped the understanding of education transformation through the

medium of official policy. The various contributors show clearly that these concepts are value laden, historical and political. Lungu describes the ideal process involved in policy formulation and highlights the stages of policy development from text to act within the context of the parliamentary process. Carrim, Soudien and others evaluate two key concepts which have crucially shaped the policy process: equity and decentralisation. They describe how policy choices are made and the potentially unequal outcomes associated with such choices. Carrim provides a critique of the concept of decentralisation in relation to the different notions of participation embedded in policy texts. Carrim concludes that while decentralisation may, as claimed, extend democracy, it holds serious limitations in the South African context. These authors succeed in drawing attention to the shift from an open policy formulation process to a more formal system of policy enactment which despite the good intentions of government, limits the space for civil society participation.

The third section focuses on higher education with respect to the politics of policy implementation. The chapter by Moja and Hayward follows the trajectory of policy development in higher education from the struggles of the early 1990's through the period following the 1994 elections. Isaacs provides an account of the processes underlying the National Qualification Framework (NQF) and the challenges in implementing this framework. Reddy offers an analysis of the tension between institutional self interests and regional cooperation following his assessment of regional consortiums that were intended to foster cooperation and to allieviate inequalities between privileged and disadvantaged institutions.

Jansen critiques the increasing management and market discourses in higher education, which he feels will further disable historical disadvantaged institutions.

The fourth section analyses the constraints on educational policy implementation. The authors question the extent to which the policies that have been formally enacted can be implemented and institutionalised at school level. Welton describes the severe capacity constraints for implementation and argues for a more focussed approach to training as he considers this crucial for successful policy change. Sayed critically reviews the work of the National Task Team of Education Management Development and questions whether it offers a relevant training strategy. Malcolm provides an insightful account of the implementation of outcomes based education in South Africa.

The final section provides alternative explanatory frameworks for understanding the dilemma of education policy implementation. Sayed outlines the influences, highlights the tensions and contradictions and their consequences in terms of policy formulation. Jansen experiments with the notion of policy as political symbolism in his attempt to explain non reform in education since 1994 and argues that this is likely to rule out any major transformation of education in South Africa's future. He sees this as the key policy question that needs to be asked in the future: can South Africa in fact move beyond symbolic policy and implementation constraints to craft the vision for education so eloquently portrayed in official policy? My research on the Eastern Cape, recounted below, is a comment on exactly that question!

CONCLUSION

In my view, there is a need to go beyond the broad themes of development, globalisation, and education and training, as discussed in much of the literature reviewed as part of this chapter, to explore the dynamics between national and provincial relations, and between policy formulation and policy implementation from the perspective of an individual province. I believe this study will provide a unique contribution to the current literature as I am not aware of any empirical research of a similar breadth and nature being undertaken elsewhere in South Africa. I also believe that a study of South African educational issues may provide an insight into a broad range of concerns shared by developing nations whose peoples have been marginalised by authoritarian regimes, and who are now trying to revive their national cultures through education. I am confident that any reader of this thesis will reach the conclusion that this study will add to the body of knowledge, and that

> *this is the exact study that needs to be done at this time to move knowledge in this field a little further along.* Rudestam and Newton, 1992, p. 47.

That having been stated, it is now necessary to discuss the methods employed in the undertaking of this research.

CHAPTER 2

RESEARCH DESIGN AND METHODOLOGY

INTRODUCTION

The purpose of this chapter is threefold:

- To describe the research design, strategy and methods used in the context of this study,
- To discuss the relative merits and limitations of such an approach.
- To outline the inherent research constraints placed on an 'outsider' researching in South Africa. These include access, data quality, outsider/insider conceptualisation and linguistic limitations.

RESEARCH DESIGN

Given the nature of my research questions and the fact that I wanted to carry out exploratory research in a natural setting I settled quickly on a qualitative approach to this study. It took some time however before I settled on a grounded approach as I had no previous knowledge or experience of using it. In the end I was persuaded by its use of a systematic set of procedures from which it may be possible to generate a theory from a series of events, and by the limitations of other qualitative traditions of enquiry. I was especially conscious of the fact that I was planning to collect my primary data by interviewing a large cross section of people who were working, or had worked in the province's education service. A subsequent review of the literature (Silverman 2000, Creswell 1998, Strauss and Corbin 1990, and Glaser and Strauss 1967) pointed strongly to the adoption of a

grounded theory approach. Creswell's (1998) comparison of several traditions was particularly helpful. Two tables from his book entitled Qualitative Inquiry and Research Design are reproduced here as Figure 1 and Figure 2.

At a pragmatic level, I could not envisage how a biographical approach or a case study which concentrated on one, or a small number of key individuals, could provide me with the range of in-depth experiences and social phenomena I was seeking. Similarly, as I had no intention of attempting to describe or interpret the behaviours of a group, I also rejected an ethnographic design. Although I knew that observation as a research method could provide me with a body of data and with the deeper understanding of social phenomena I was seeking, (particularly in terms of my own social interaction with key players) I also knew that the setting for my research was not naturally suited to this method of research. My sources were drawn from diverse groups within the education service in the Eastern Cape, located in offices separated by huge distances. In aggregate they formed a large sample group of 43 key informants. There was no opportunity, no single occasion or event during my fieldwork, when all these groups came together either professionally or socially. Furthermore, as my study was fundamentally retrospective, I concluded that I was unlikely to gain the body of data I needed using this method of research.

I took the same view of a phenomenological design as it was not my wish to examine the meaning of people's experiences towards certain phenomena.

FIGURE 1

DIMENSIONS FOR COMPARING FIVE RESEARCH TRADITIONS IN QUALITATIVE RESEARCH

Dimension	*Biography*	*Phenomenology*	*Grounded Theory*	*Ethnography*	*Case Study*
Focus	Exploring the life of an individual	Understanding the essence of experiences about a phenomenon	Developing a theory grounded in data from the field	Describing and interpreting a cultural and social group	Developing an in-depth analysis of a single case or multiple cases
Discipline Origin	Anthropology Literature History Psychology Sociology	Philosophy, sociology and psychology	Sociology	Cultural anthropology sociology	Political science, sociology, evaluation, urban studies, other social sciences.
Data Collection	Primarily interviews and documents	Long interviews with up to 10 people	Interviews with 20-30 individuals to "saturate" categories and detail a theory	Primarily observations and interviews with additional artefacts during extended time in the field (e.g. 6 months to a year)	Multiple sources – documents, archival records, interviews, observations, physical artefacts
Data Analysis	Stories Epiphanies Historical content	Statements Meanings Meaning themes General description of the experience	Open coding Axial coding Selective coding Conditional matrix	Description Analysis Interpretation	Description Themes Assertions
Narrative Form	Detailed picture of an individual's life	Description of the "essence" of the experience	Theory or theoretical model	Description of the cultural behaviour of a group of an individual	In-depth study of the "case" or "cases"

Source: From Creswell 1998 p.65

FIGURE 2

DATA COLLECTION ACTIVITIES AND THE FIVE TRADITIONS

Data Collection Activity	*Biography*	*Phenomenology*	*Grounded Theory*	*Ethnography*	*Case Study*
What is traditionally studied? (site/individual[s])	Single individual, Accessible and distinctive	Multiple individuals Who have experienced the phenomenon	Multiple individuals who have responded to action or participated in a process about a central phenomenon	Members of a culture-sharing group or individuals representative of the group	A bounded system such as a process, activity, event, programme, or multiple individuals
What are typical access and rapport issues? (access and rapport)	Gaining permission from individuals, obtaining access to information in archives	Finding people who have experienced the phenomenon	Locating a homogenous sample	Gaining access through gatekeeper, Gaining confidence of informants	Gaining access through gatekeeper, gaining confidence of participants
How does one select sites or individuals to study? (purposeful sampling strategies)	Several strategies depending on person (e.g., convenient, politically important, typical, a critical case)	Finding individuals who have experienced the phenomenon, a "criterion" sample	Finding a homogenous sample, a "theory-based" sample, a "theoretical" sample	Finding a cultural group to which one is a "stranger," a " representative" sample	Finding a "case" o "cases," an "atypical" case, or a "maximum variation" or "extreme" case
What type of information typically is collected? (forms of data)	Documents and archival material, open-ended interviews, subject journaling, participant observation, casual chatting	Interviews with up to 10 people	Primary interviews with 20-30 people to achieve detail in the theory	Participant observations, interviews, artifacts, and documents	Extensive forms such as documents and records, interviews, observations, and physical artifacts
How is information recorded? (recording information)	Notes, interview protocol	Long interview protocol	Interview protocol memoing	Fieldnotes, interview and observational protocols	Field notes, interviews and observational protocols
What are common data collection issues? (field issues)	Access to materials, authenticity of account and materials	Bracketing one's experiences, logistics of interviewing	Interviewing issues (e.g., logistics, openness)	Field issues (e.g., reflexivity, reactivity, reciprocality, "going native," divulging private information, deception)	Interviewing and observing issues
How is information typically stored? (storing data)	File folders, computer files	Transcriptions, computer files	Transcriptions, computer files	Field notes transcriptions, computer files	Fieldnotes, transcriptions, computer files

Source: From Creswell 1998 p. 112-113

RESEARCH METHODS

As previously stated, the final choice of research methods was a pragmatic one. My choice was determined by the nature of my research questions, and by what I wanted to see as outcomes of this study. Prime amongst these was the need for the research methods to provide me with a deeper understanding of the social phenomena, and for links to be established between my findings and causal statements, as well as with the development of theory. Secondly, it was not my wish to have my research questions fettered by the use of research methods which were unlikely to reveal the nature of social processes. Thirdly, I did not wish to produce a set of generalisations based either on quantifiable survey data or an examination of official statistics. I therefore concluded that I did not wish to pursue a quantitative study.

The analysis of documents including central and local government reports, (current and archival) journals, and newspapers (current and archival) provided much of real value in the development of my understanding of the historical events which occurred in South Africa, both prior to, and since 1994. Over the lifetime of this study, I have collected a large number of documents in an attempt to piece together the events which occurred in the country, and particularly in the Eastern Cape. Many of these documents had the effect of corroborating data provided through my primary research instrument: the in-depth interview.

In an attempt to gain a deeper understanding of the 'education experience' in the Eastern Cape, and the perceptions of key persons who were working or who had worked within that service, I saw a very clear role for open-ended and semi-

structured interviews with my sources. I did not see a role for the use of fixed-choice questions within a random sample of structured interviews, as I did not believe that this method was likely to produce the kind of data from which theory could be developed.

FIELD ACTIVITY

The data was collected via interviews and with reference to a range of archival and recently published documentary materials comprising national and provincial government publications, ministerial speeches, published texts, newspaper articles, completed dissertations and other documentation produced by university policy units, trade unions and NGO's. A mix of 40 semi-structured and unstructured interviews were held with current and retired ministers, education officials, school principals, and representatives of trade unions and NGO's. Although the interviews took on average one hour to complete, there were several that took considerably longer because of the wish by some of my interviewees to respond in substantial detail to my questions because of the importance they attached to this research.

The interviews took place in a mix of settings including government and private offices, schools, private homes and a coffee shop. The last of these settings was used as a place of last resort in view of its potential for distraction and disruption. Interviews which did take place in this particular setting began early in the morning to minimise the possible impact of both these problems. Its special advantage, however, was its close proximity to the major highways, to the

neighbouring township of Mdantsane, and to excellent car parking facilities. As it was considered unsafe for me to travel alone into the township I interviewed five of my informants, all of whom worked and lived in the township, in this coffee shop.

Two of the interviews had to be repeated, as the quality of the audio recording was poor. The issue here was not to do with disruption or high levels of background noise, but rather my own carelessness in not ensuring that the recording equipment was set up in a proper way.

The aim of these interviews was to:

- explore the effectiveness of the Eastern Cape Department of Education to implement government policy, and
- understand the processes and events which led to specific outcomes in the Eastern Cape (what Huberman and Miles, 1994, call 'local causality.')

The interviews themselves were informal, face to face, in-depth and exploratory. In the interviews I used audio tapes to record them as I wanted a full record of the discussions and because I wanted to be an active listener, ready to probe whenever necessary. I used a note pad to control the line of questioning. On occasions, in my preamble to the interviews I referred to the relationships which I had already established through my previous, non-research related visits to the Eastern Cape and through my hosting in Oxford of several officials from the Eastern Cape Department of Education in an attempt to make my sources feel more at ease. I stressed however that the interviews were confidential and that I was interested in the data, and not them. During the research I also kept a note

book to record my field notes which were a mix of information, (e.g. events, conversations, documents to read, copy or purchase) and my comments which included my impressions, interpretations and feelings.

Through my preliminary meetings at the Department of Education and my two pilot interviews I had the opportunity to discuss, and try out, the methods I intended to use in my interviews. During this process I was able to identify the nature and number of the topics, issues, and events which I wanted to explore during the interviews. A list of the interview questions is attached as Appendix 1. They include questions which seek to:

- discover the impact of the major political changes on the number of civil servants who decided to remain in the provincial administration following the end of apartheid. Here I was endeavouring to assess the fallout in terms of professional skills and the extent to which the new bureaucracy was equipped with the administrative and managerial skills to implement government policy;
- establish the extent of positive affirmation policies in the recruitment of personnel to the new department;
- establish the extent and nature of the challenges facing the new administration;
- discover the extent to which policy makers in national government understood the challenges facing the provincial administration in delivering services;
- discover the level of involvement of external consultants;

- define the extent to which the responsibilities of central government and provincial government were clear, and the extent to which civil servants working in the provincial administration were involved in policy formulation;
- discover what steps were taken by the provincial administration to consult and involve education stakeholders and local communities in the arrangements for policy implementation;
- discover the achievements and failures of the education department;
- examine the extent to which the new department had established suitable management structures to deliver services;
- explore the competency and effectiveness of local government officials;
- discover the level of satisfaction of stakeholders working at different levels in the education service;
- ascertain the views of education stakeholders about the direction of the government's curriculum policies: market-led policies versus social democratic and redistributive policies;
- establish the extent to which there has been redress for the marginalised communities of the Eastern Cape;
- establish the extent to which governing bodies are functioning in the province's schools;
- and establish the extent to which Outcomes Based Education is being taught in schools.

Many of the questions sought to understand, in some detail, the impact of the political changes on the six former education departments, the restructuring

process, the establishment of the first department and the capacity of the new department to implement government policy. I considered the last of these to be a key area of investigation. Issues relating to equity and redress, to the level of participation, particularly as it relates to school governing bodies, and issues of consultation were also pursued as they are central to my hypothesis. Finally the policy formulation/ policy implementation dynamic was explored via the polemic around Outcomes Based Education as the government's preferred vehicle for the delivery of the curriculum in post-apartheid South Africa.

Each interviewee was asked a set of predetermined questions. Supplementary questions were also asked where appropriate, either to elicit the full meaning of the respondent's answers or to develop further the information gleaned on a topic being discussed. I conducted 40 interviews with informants drawn from all levels of the education service. It was only lack of time that prevented interviews with parents of students, and students themselves. As some of the informants had children of school age passing through the school system, I took the view that I had, in an indirect way, received the contribution of parents. I would however encourage any extension to this research study to actively seek the inclusion of these two groups, as the parents I met were clearly not typical of the majority.

I was also able to explore, albeit with varying degrees of success, archival and recent material belonging to the Eastern Cape Department of Education. It was not until my last research visit to South Africa in January 2000 that I became aware of the existence of the Education Management Information Systems section

(EMIS) in a Teachers Centre in East London. In his current capacity as Acting Head of the Section and as an ex member of one of the transitional provincial bodies established prior to the formation of the first Department of Education, this official was in possession of many of the early documents produced by the Education Transitional Task Team and the new Education Department during the first twelve months of the transition. He was also actively engaged on a daily basis in data gathering and in the tabulation of information as it related to the capacity of the province's education services. As the earlier documents were of historical importance I agreed to return them at the completion of this research whilst the more recent information was given to me for my retention.

I was also able to obtain from other sources, semi-official and official documents, public documents such as minutes of meetings, education journals, newspapers and published and unpublished research dissertations held at the Government Print Offices in Cape Town, the Department of Education, the South African Government Library in Cape Town, the libraries of the Education Policy Units at the University of the Western Cape, and the University of Witwatersrand, Johannesburg, and newspaper offices.

Between 1997 and 1999, I collected many other documents. These included Government White Papers, Bills and Acts of Parliament. I also collected texts, journals and occasional papers from the Research on Education in South Africa Unit at the University of London, Institute of Education, (RESA), the Centre of African Studies at the University of Edinburgh, the Centre for Education Policy Development in Johannesburg, the Education Policy Units at the

Universities of the Western Cape and Witwatersrand, the Joint Education Trust in Johannesburg, the University of Fort Hare in Alice, and the South African Comparative and History of Education Society (SACHES) in Gaborone, Botswana. I also collected copies of government gazettes and circulars, and copies of ANC and national and local government reports and policy documents. All these documents I considered to be relevant to my study. Their particular importance lay in the fact that they provided an historical, political, and educational contextual framework. Primary textual documentation proved difficult to secure – many of the offices and schools I visited seemed bereft of policy papers and official documentation. Lengthy departmental strategy documents and annual reports were forthcoming. Their quality, detail and comprehensiveness seemed at odds with everything else I came across. I was to discover later that whilst there was input by senior departmental officials into the development of the strategic plans – external consultants from South Africa and overseas were relied on to provide technical assistance – it is questionable how much ownership external stakeholders in the Eastern Cape had in the formulation process or the extent to which the completed plan was shared with them. Whilst the use of consultants was clearly a pragmatic response to the lack of time and capacity amongst departmental officials to produce such documents (their efforts were properly focused on maintaining the functionality of the department), the documents created, were, in my view, for the consumption of a few, with unrealistic action plans and time frames.

Newspapers covered educational issues extensively. Although I was able to glean background information from them, I remained circumspect about their accuracy. It is nevertheless interesting to note that much of what was printed matched the broad experiences and views of stakeholders working in the field.

DATA ANALYSIS

In keeping with the procedures involved in a qualitative study using a grounded theory approach, I am attempting to generate a theory through the data collection and data analysis process.

> *Its systematic techniques and procedures of analysis enable the researcher to develop a substantive theory that meets the criteria for doing ' good' science: significance, theory-observation compatibility, generalisability, reproducibility, precision, rigor, and verification. While the procedures are designed to give the analytic process precision and rigor, creativity is also an important element. For it is the latter that enables the researcher to ask pertinent questions of the data and to make the kind of comparisons that elicit from the data new insights into the phenomenon and novel theoretical formulations.* (Strauss and Corbin, 1990: 31)

With 42 sets of data arising from the interviews, I decided to use a computer software programme which has been developed and influenced by the grounded theory approach (Atlas/ti) to help me with the analysis of the data. The first step however was the transcription of the audio tapes. As I was temporarily based in South Africa with effectively 6 months to undertake the collection and analysis of the data, I decided that it was essential for me to have the audio tapes transcribed quickly so that I could begin to use the software programme and

complete my data analysis. My first port of call was the University of Cape Town's Media Department. One of the members of the department's staff agreed to transcribe a small number of the tapes. Although the tapes were successfully transcribed, the speed at which they were transcribed gave me little confidence that all the work would be completed by the time I needed to begin working on them. As a result I approached a private transcribing service who allocated the tapes to a team of 7/8 transcribers. Although this ultimately proved to be an extremely expensive exercise, the work was completed quickly and efficiently. All the tapes were transcribed onto floppy discs and paper. Although I attempted to analysis the data as soon as it had been transcribed, I found the process of returning to the field to collect further data and then returning again to continue the analysis (Creswell (1998) describes it as the 'zigzag process') particularly disruptive to both the collection and analysis of the data. In my view the analysis of the data, in particular, demands continuous periods of focused activity.

The second step involved the conversion of the transcripts from Microsoft WORD to a plain text (ANSI) which could be 'manipulated' by the software. In the language of the software these transcripts became my primary documents. By reading and re-reading these documents I began to formulate, as the third step in the analysis of my data, a categorising and coding strategy which enabled me to sort the data into broader themes and issues. A list of the codes I produced is attached as Appendix 2 to this chapter. The program also provided me with the opportunity to write reflexive memoranda to myself as I sorted the data into themes. A list of the titles of these memoranda is attached as Appendix 3. The

Atlas/ti program then allowed me to identify relationships in the data and to connect the categories and emerging themes. It does this via a networking facility, which enabled me to link together my self-generated codes and memos to connect related categories, and themes. An example of one of the networks is attached as Appendix 4.

LIMITATIONS OF APPROACH

The tedium often associated with dealing with bureaucracy meant that it was important that I remained patient. On occasions I waited for hours in departmental offices for my interviewee to turn up, accepting without obvious impatience, messages from these officials that they had been held up in meetings which were overrunning. It meant that I had to contact them again, agree a new interview date and venue. I invariably agreed to meet them wherever it was most convenient for them. This resulted in some lengthy car journeys to unfamiliar parts of the province.

The interviews, themselves, were time-consuming and required a noise-free or low noise environment with little interference. Although all the interviews were conducted in a common language, English, I had some difficulty in comprehending some of the respondents' answers. As a result I had to ask for some answers to be repeated or I asked a follow-up question to check that I had interpreted their first answer correctly. In some instances I found the support of a retired teacher invaluable as she encouraged my interviewees to speak up, and to

respond in an open and honest way. The fact that the interviews provided a huge amount of valuable data overcame any limitations and irritations.

PRACTICAL ISSUES

Negotiating Access

I received the necessary authorisation with some ease as I was known both to Mrs Balindlela, the Minister of the Executive Council, and to senior officials within the department through the link between Oxfordshire County Council and the Eastern Cape Department of Education. It is evident from the letter of authorisation, a copy of which is attached as Appendix 5, that my research proposal was welcomed, that it was contemporary, but that the department were seeking a more extensive research study than the one I was able to undertake at that time. Any misunderstandings in terms of expectations were quickly resolved when I described the limits of my own resources. In his letter, dated October 1997, Mr. Franzsen, the Acting Permanent Secretary at the Department of Education, gave me the level of access I was seeking to undertake this research. At the time I thought this letter would be needed to secure meetings with my sources, particularly as I thought that it could be difficult to persuade local politicians and education officials of the merits of this research. As it turned out, the real value of the letter however, was psychological as it provided me with the comfort I needed to confidently seek out my informants. Even though I carried it with me whenever I visited the Department of Education buildings in Bisho or the

regional or district offices, I cannot recall a single occasion when I actually needed to refer to it or to produce it for any of my interviewees.

As a result of several preliminary meetings with senior civil servants at the Department of Education, I identified the key informants for my research. By the time I began my interviewing in January 2000, I had already secured the agreement of several of them to be interviewed as part of this research. All of the access agreements required individual negotiations, some of which required considerable explanation. I was both circumspect and sensitive to the contemporary dimension to my research. All of the informants had either been, or presently are, key players in the new structures. Several of them are retired, or are no longer working within the Department; some having moved on as their contracts of employment were not renewed. It should be noted that although I went to considerable lengths to interview my informants, I was ultimately unable to interview two key sources, both of whom were leading players in the Eastern Cape department of education. They were Mrs Balindlela, Minister of the Executive Council, (the Education portfolio holder in the Cabinet) and Dr. Van Wyk, her Permanent Secretary and Head of Department. Despite receiving approval on several occasions for the interview to take place, I was unable to secure an interview with the Minister. I was informed by his associates that Dr Van Wyk had emigrated to Canada, and again despite attempts to contact him for an interview, I eventually had to concede that it was not going to be possible for me to speak to him.

The names of the interviewees have not been included in the thesis. I have included quotations from many of the respondents wherever appropriate as I believe them to be critical to the grounded theory approach I have employed for this research. Each quotation has been given a random numbering system to retain the confidentiality of the respondent.

Ethical Issues

I was conscious throughout my research that, despite my origins, I was an 'outsider' carrying out research in a foreign country. This enabled me to be detached, objective and tenacious in terms of seeking the truth about the events and circumstances which took place in the province. It also meant that I could check and double check the information I received without embarrassment or fear of reproach from my sources. I did this by asking questions about the same issue in slightly different ways to check the consistency of the responses. I believe I was able to overcome the challenges of being an outsider, i.e. gaining access to my informants, by my personal credibility as a researcher, the development of trust in the interviewer/interviewee relationship, and the sensitive handling of my research findings, by my South African background, and as a result of my teaching and local government experience, both of which I concluded, gave me an insight into the meaning of the Eastern Cape experience. Although I never became accepted as an 'insider' or native researcher, I was conscious that because of my own personal history and my own development work in South Africa, I may have brought certain biases to the interviews and more critically some distortion to the

interpretation. As a qualitative researcher, it was important for me to minimise these biases. I achieved this by adopting an interview strategy which included

- a wide survey of responses, (interviewees were drawn from different sectors of the education service)
- and by validating my findings by working closely with several critical friends, which included two academics from the University of Fort Hare, two officials from the provincial department of education, and a retired teacher, highly respected in the black community of educators.

I took particular care throughout my interviews (but particularly in my opening remarks at the beginning of each interview) about the way I asked questions and about the timing and appropriateness of my interventions. In fact I refrained from any intervention which could be perceived as commentary to a response. I sought to remain neutral and non-judgemental throughout the interviews. My interview questions were drawn up in collaboration with my 'critical' friends, who checked them for scope and detail of enquiry. I believe that my sensitivity to these biases has actually helped me to shape the way I view and understand the data I collected and the way in which it has been interpreted.

I also received a considerable amount of indirect information from my interviewees. Whilst not being directly relevant to the specific areas of my research, I took the broad view that it was additional, if not always relevant, background/contextual information.

To ensure that my research was valid, I repeatedly cross-checked my data to ascertain its accuracy by discussing my conclusions with my critical friends

whom I regarded as authoritative and trustworthy. It was my opinion that I would gain a better assessment of the validity of my research through the careful selection of my informants, all of whom represented distinct groups i.e. politicians, civil servants, trade union representatives, leaders of NGOs, and school principals. Finally, in terms of data quality and reliability, I interviewed a large number of informants who worked both inside and outside the department of education, in schools and in higher education. Several respondents held senior positions in the teacher unions. As my data is deep in detail, and my source material broad, I expect others will be encouraged to use this type of research in other regions of South Africa, to examine whether the same patterns or themes have been observed.

CHAPTER 3

THE CONTEXT OF THE EASTERN CAPE

INTRODUCTION

This chapter is an analysis of the Eastern Cape context from the perspective of its socio economic profile, its recent historical and political legacy, and the provision of education. The common theme throughout this chapter is the province's rurality and poverty, the combination of which provide specific and unique challenges to the effective delivery of public services. These challenges are discussed at some length in the chapter which follows. The reader is also referred to Appendices 6–15 which are to be found on pages 262–271 of this thesis. These figures include a series of maps and one table which expose for the year 1996 the poverty of the educational landscape in large parts of the eastern and northern regions of the Eastern Cape. In summary the maps reveal:

- the six regions and 41 districts making up the province of the Eastern Cape (Appendix 6);
- an overview of the education infrastructure backlogs in the Eastern Cape and the estimated cost of eliminating these backlogs by 2008 (Appendix 7);
- the number of learners per educator (Appendix 8);
- the distribution of education institutions by type (Appendix 9);
- school buildings according to their condition (Appendix 10);
- the learner/classroom ratio (Appendix 11 and Appendix 12);
- the supply of power to schools (Appendix 13);

- the availability of water at schools according to type of supply (Figure 12);
- and the availability/shortage of classrooms in the province. (Figure 13).

The chapter concludes with a focus on rural schools, a large number of which are located on working farms. Rural schools represent the largest number of schools in the Eastern Cape, and whilst farm schools are not unique to the Eastern Cape they are an important part of the educational landscape of this province. It is not the aim of the writer, in this study, to differentiate between rural schools in general and farm schools in particular, the latter being provided to varying standards by farm owners.

***SOCIO-ECONOMIC** **

The Eastern Cape is one of the most impoverished provinces in South Africa with a clear urban – rural divide. The urban centres are limited to two main coastal towns and their surrounding hinterlands. The remainder of the province, which is bereft of mineral resources, is predominantly rural with minimal infrastructure. In these areas of the province, roads, telecommunications and services are deficient. Only 14% of rural households have running water. 26% of rural households have no sanitation.

**Unless otherwise stated, all figures quoted in this section, are taken from:* Living in the Eastern Cape- Selected findings from the October 1995 Household Survey CSS Pretoria 1998; *The People of South Africa Population Census, 1996; Census in Brief, Statistics South Africa. Report No.1:03-01-11, 1996 in* Eastern Cape Skills, Service Delivery and Personnel Audit, May 1999. Kruger, V. and Grinker, R.

58% of rural households are over 5 kilometres from the nearest clinic. As more than two thirds of the province is rural, its economy is based on agriculture. The agriculture, forestry and fishing sector employs 17% of the working population. The manufacturing sector accounts for only 9% of the province's employment profile.

In 1994 the province inherited the two former Homelands of the Transkei and Ciskei with their attendant legacies and profile of low employment. The Eastern Cape also has a major regional dichotomy. In the west, the infrastructure, and provision of utilities like electricity and water, are sufficient to meet the basic needs of the people. In the east, large tracts of land have no power or running water. In the west, people can speak or understand English, even if their first language is Xhosa or Afrikaans. In the Eastern region, the first language is Xhosa and the people have little or no knowledge of English and Afrikaans

The Eastern Cape has a huge rural constituency. The greater part of the province's population of 6.3 million people is based in the former Transkei, the most impoverished part of the province. The province is 57% female, and 50.9% of the population is under 19, most of whom are of school age or younger. The impact of the country's mines closing down and the removal of the state subsidies in the former homelands of the Ciskei and Transkei has resulted in the Eastern Cape having the highest unemployment rate amongst males in South Africa, and to a concentration of the Province's industries and employment in Port Elizabeth and East London. During the last twenty-five years, a predominately female

dominated family structure has emerged with welfare grants and pensions being the sole income in a large number of families.

TABLE 1
NUMBER OF CHILDREN LIVING BELOW THE POVERTY LINE, 1993

Province	Population	% of all children in Province
Eastern Cape	2182949	70
Northern Cape	130048	52
Western Cape	276138	22
Free State	635735	57
KwaZulu Natal	2159992	56
Gauteng	555426	25
Mpumalanga	636157	52
Northern Province	1923925	74
North West	585890	49
Total	**9086260**	**54**

- African children comprise 96% of all poor children.
- Most poor children (76%) live in rural areas, 15% in urban areas and the remainder (9%) in metropolitan area.

Source: Whiteford A. et al., *A Profile of Poverty, Inequity and Human Development,* HSRC, 1995, p.7

45 % of employed males and 39% of employed females earn less than R999 (approximately £90) per month. 32.2% of the working population are unskilled workers. The largest single employer in the province is the Public Service.

> *Public sector and parastatal employment in the former homelands provided a 'safety net' for large populations for which the apartheid system otherwise offered no [other] means of subsistence. Given the almost total lack of economic activity in many rural areas, this often continues to be the case.* Kruger and Grinker, 1999, p.36

The number of unemployed people in the province is currently 49%, which is substantially higher than the rest of the country. (29%) The Eastern Cape

has the highest level of unemployment in the rural areas of all the provinces (49%) as compared with a national average of 38%. Unemployment and poverty are major problems in the Eastern Cape.

HISTORICAL AND POLITICAL

The 1980s saw major disturbances in schools for black children across South Africa. Initially the riots were spasmodic, causing limited disturbance to the schools. Teaching continued to take place when the children returned, and teaching and learning remained largely unaffected in the primary and rural schools throughout this period. The disturbances intensified and the violence became more frequent from 1985 onwards. Schools were being disrupted on a daily basis. Time and again the students would run out of the school and take part in some action. Members of the Congress of South African Students, COSAS, would go to schools and demand to meet the children. School principals endeavoured to drive them away, but schools were vandalised and others were burnt down. As the 1980s progressed the schools became centres of political activity. The African National Congress (ANC) armed struggle intensified during this period, and there was mass action in the country.

In the Eastern Cape all these things were aggravated by the fact that the province was perceived to be the centre of political activity and of resistance against apartheid education. During the political struggles, the schools, and particularly the urban ones, were functioning as sites of struggle – as illustrated

below in the lengthy extract from the head teacher of a school in the former Ciskei homeland.

> *As the winds of change swept through the country, our school, from 1991, started to experience some problems as student organisations were established in the Fort Beaufort area and a kind of political activity started developing in the school. We were tempted as educators to assist in terms of giving direction around this, by inviting some speakers to come and address the students on issues that they would need to know more about. But this thing escalated to such an extent that we started losing the grip that we had on them, and it manifested itself through farewell functions. That event was politicised to the extent that the prize-giving part of the event was seen as rewarding people for achieving through a Bantu Education. So it was seen to be promoting Bantu Education. It was seen in that light, and therefore children started rejecting that, and then the Matric dance. That was 1991/1992. We tried to establish with them the reason behind the farewell one, but there was a general feeling around that there was no need for those things. At Thubalethu School there was, from 1992, a slow decline in terms of discipline in the school as the students got more involved with the political activities. They succeeded in making the children look at us as people who were against change in the country, and to whom no-one should be listening as they don't know anything. Political activists would come into the school under the cover of darkness to address groups of students, and the following day there would be no school. There was total breakdown in authority in the schools, with children just not coming to school. No one was able to punish them, otherwise they would be targeted. Schooling did not totally stop, but there were long periods when schools were not functioning. When a strike was declared, it would lead to two or three months without education in some communities. Schools would be closed. I think at that stage, in their minds, there was nothing else except this notion of activism. Education itself, at this stage, was on the back burner. What was important now, was to make sure that the system was unworkable. And it became unworkable. They recognised that if they took action after school, it had no impact at all, and that schooling just carried on. So schooling was disrupted during the day.* Interview with Interviewee No. 1, March 2000

The movement for an alternative education system in South Africa included the National Education Crisis Committee, NECC. It was composed of

ANC academics working underground, educationists, principals, teachers, and student leaders. The NECC programmed research work in education and commissioned academics from various universities to undertake research into the replacement of apartheid education by a new democratic educational system. Facilities were created for research, and for discussions for people to debate the future landscape of post-apartheid education. Following the unbanning of the ANC in 1990 there were many conferences in the country, considering issues like the democratisation of education, the question of training and skills in education, and the need to identify people who could manage the system. Although pupil attendance began to improve gradually with the unbanning of political organisations in the 1990s, schools in many of the township areas were still clearly dysfunctional. There had been a complete breakdown of teaching and learning in many of the schools and as a consequence there had been no teaching and learning taking place for a number of years. Teachers were in detention, and principals were not managing their schools effectively. The school system was dysfunctional. As the major political changes were being negotiated in South Africa in the early 1990s, the National Education and Training Forum emerged.

Provincial chapters were established in 1993 in East London, Port Elizabeth and the Transkei to prepare for the impending changes, and to orchestrate a process of change around a transformation agenda. It was a multi stakeholder forum, ANC aligned and driven, which brought together all the different sectors including the Non-Governmental Organisations, (NGOs) the formal education sector, and the teacher unions.

Within the ANC there was a lot of debate about how to manage a transition, both at a national level and at a local, provincial level. One of the important innovations that came out of that process was a recognition that a mechanism was needed that allowed strategic thinking and drove the broader strategic process, whilst levels of functionality within the present system were maintained or even improved, so that the system was not rendered dysfunctional just as we were beginning to think how to transform and change things. I used the term that it's like fixing a ship in the middle of the sea. The mechanism developed was to utilise people in the process who had no direct personal interest in the new department of education. The ANC invited its Civil Service Unit to participate in the overall process of public sector transformation and the strategies around that. One of the interesting innovations that came out of that process was that all the former departments set up strategic management teams. Interview with Interviewee No. 2, February 2000

The forums comprised up to 20 elected representatives. There were subcommittees covering a broad range of education matters including teacher education, adult education, tertiary education, secondary education, primary education, the teaching of history, admission arrangements, and technical education. The NGO influence was valuable as they had access to funding to enable the work of the forums to move forward. There were weekly meetings of the forum. There were also consultative forums which were very large meetings, held once a month where all the various stakeholders gave reports on the work they had been carrying out in the area of policy development. All of the work of the subcommittees was coordinated by the leadership of the forum and that participation in the forums provided opportunities to influence future outcomes. Towards the end of 1993, it became clear that change was imminent.

The ex-departments were being resistant and were withholding information because they saw their survival very much at stake and because senior management in the former departments were used to their position of patronage. They could appoint people, transfer people, and promote, and they were hoping that by not cooperating they would have the space to continue doing that. They could also see that because of the continuing discussions about the merging the six departments into one, their time in the department was limited. So officials began to hide money, spend money, put people into positions, and generally make things more difficult for the new administration in the weeks before April 1994. There was also the other side to that kind of scenario because people were being tempted to buy into the system as well. That was prior to us having a plan of resource and personnel distribution. People would come and see us quietly and privately and ask for favours like appointments as a principal or to be transferred from one school to another. Interview with Interviewee No. 3, March 2000

The forum had two focuses. The first focus was a fire-fighting one, essentially around crisis management and the student boycotts. The second focus was on medium to long-term issues, which included policy development, the shape of the new unified Department of Education, the new curriculum, the transformation process and adult basic education. This process extended into 1994 and via the various consultative fora manifested itself as the precursor to democratic education in the province.

There was also a considerable amount of uncertainty in the schools. Schools serving the white communities were unsure of their future in the new dispensation, and particularly concerned to know if their resources would be transferred to non-white schools. In black schools the uncertainty revolved around the absence of a culture of teaching and learning in the schools and whether it could be restored.

EDUCATION

In the Eastern Cape there were six departments of education catering for each of the racial groups: the Indian, Coloured, White and Black racial groups and the two independent homeland states of the Ciskei and the Transkei. These departments were collectively responsible for 2.3 million students and 58000 teachers. The Eastern Cape has the largest school-going population after the province of Kwazula Natal. It also has one of the highest teacher:pupil ratios in the country, which is a consequence of the shortfall in classroom accommodation in the province and the mass return of students to school following the political changes in 1994. In the Transkei, the average teacher:pupil ratio was 1:70. Elsewhere in the Eastern Cape the teacher:pupil ratio in the former Department of Education and Training, DET schools, and the Ciskei homeland schools was 1:40. In the west of the province schools were relatively well-endowed with resources, had better trained personnel and a lower number of learners. This resulted in better teacher:pupil ratios and a quality of education that was not available to schools in the eastern region. There is a massive disparity in the numbers of teachers: 1:70 pupils in the Transkei and 1:20 in the former white schools. The 1:70 hides the fact that in some schools the pupil teacher ratio is 1:40 and in others it is 1:100. Combined classes in the rural schools were commonplace, as were extended age ranges with overage students. In the secondary schools with their high repetition rates and student returners it was not unusual for schools to have students aged up to 25 years.

The majority of schools in the province are in remote areas and are highly inaccessible. The poor roads mean that these rural schools are rarely visited by any departmental official. There are huge infrastructure problems in Eastern Cape schools. In some areas children are taught under trees and in mud huts. The Department of Education and Training (the department responsible for the education of black students) and the Ciskei Department of Education had built some schools in their regions but there was generally insufficient funding to provide the equipment, books, and the full complement of teachers that was needed to enable these schools to function adequately. Overcrowding was therefore the norm. There is, at the time of writing, a shortfall of 22,000 classrooms. This backlog is aggravated by the effects of tornadoes, which cause schools to be washed away by floods or destroyed by the wind. Telephone contact with 81% of the province's educational institutions is non-existent. Although 64% have a water supply, many schools have no running water and rely on rainwater and collecting tanks. Of the province's 5880 schools, 77% do not have electricity. The vast majority of the schools are in rural locations in the former Transkei area, which has almost 60% of the Eastern Cape's learners. There are massive problems of provisioning of the rural schools, which were grossly neglected during the apartheid era. Tables 2 to 6, which follow below, illustrate how the Eastern Cape compares with other provinces in key infrastructural matters – in most cases adversely.

The apartheid government regarded the rural areas as labour reservoirs. Black children only had to learn enough to take up menial occupations. There was

no science or maths teaching, except in a rudimentary way, and with poorly trained teachers. 42% of the teaching force are either unqualified or under-qualified. In addition, within the former black schools there is virtually no management. There will be a principal, and perhaps a deputy, but no heads of department, no secretary, no clerks. A typical small white school will have two secretaries, 5 clerks, and 8 cleaners, heads of departments, and 2 deputy heads. As a large number of the schools serving the black communities are located in remote areas with poor roads, few telephone links, and are situated long distances from the district offices, they seldom receive support and guidance from the district office officials who lack the appropriate transport to visit the schools. On occasions schools have no alternative but to hire cars to collect books and other resources from the district offices, which they can ill afford.

TABLE 2

NUMBER OF SCHOOLS WITH TELEPHONES

Province	Total Schools	Number with Telephones	%	Number without Telephones	%	Awaiting Verification	%
Eastern Cape	5800	1090	19	4753	81	37	1
Free State	2881	723	25	2138	74	20	1
Gauteng	2233	1883	84	343	15	7	0
KwaZulu Natal	5409	1840	34	3555	66	14	0
Mpumulanga	1907	702	37	1200	63	5	0
Northern Cape	526	398	76	120	23	8	2
Northern Province	4170	1285	31	2866	69	19	0
North West	2412	860	36	1476	61	76	3
Western Cape	1770	1547	87	215	12	8	0
Total	**27188**	**10328**	**38**	**16666**	**61**	**194**	**1**

Source: Information from the Department of Education School Register of Needs, 1997

TABLE 3

CONDITION OF SCHOOL BUILDINGS

Province	Not suitable for education	%	Major Repairs	%	Minor Repairs	%	Good / Excellent	%	Awaiting Verification	%	Total
Eastern Cape	214	4	621	11	2579	44	2276	39	190	3	5880
Free State	100	3	358	13	1319	46	1072	37	32	1	2881
Gauteng	20	1	103	5	800	36	1283	57	27	1	2233
KwaZulu Natal	180	3	1054	20	2543	47	1556	29	76	1	5409
Mpumulanga	20	1	137	7	950	50	775	41	25	1	1907
Northern Cape	11	2	45	9	254	48	209	40	7	1	526
Northern Province	1127	27	574	14	1004	24	1386	33	79	2	4170
North West	40	2	184	8	996	41	1142	47	50	2	2412
Western Cape	1	0	14	1	340	19	1396	79	19	1	1770
Total	**1713**	**6**	**3090**	**11**	**10785**	**40**	**11095**	**41**	**505**	**2**	**27188**

Source: Ibid

TABLE 4

WATER SUPPLY AT SCHOOLS

Province	Indoors or on site	% of total	No water on site	% of total	Awaiting verification/ other	% of total	Total
Eastern Cape	3747	64	1952	33	181	3	5880
Free State	2207	77	635	22	39	2	2881
Gauteng	2165	97	50	2	18	1	2233
KwaZulu Natal	3906	72	1279	24	224	4	5409
Mpumalanga	1550	81	313	16	44	3	1907
Northern Cape	491	94	23	4	12	2	526
Northern Province	2055	49	2029	49	86	2	4170
North West	2177	91	173	7	62	3	2412
Western Cape	1694	96	62	3	14	1	1770
Total	**19992**	**73**	**6516**	**24**	**680**	**3**	**27188**

Source: Ibid

TABLE 5

ELECTRICITY SUPPLY AT SCHOOLS, 1996

Province	Wired & Supplied	%	Generator	%	Other Energy Source	%	Wired & Not Supplied	%	Not wired	%	Awaiting Verification	%	Total
Eastern Cape	1086	18	60	1	195	3	211	4	4299	73	29	0	5880
Free State	1200	42	22	1	4	0	62	2	1570	54	23	1	2881
Gauteng	1934	87	2	0	1	0	77	3	206	9	13	1	2233
KwaZulu Natal	2025	37	28	1	2	0	234	4	3077	57	19	0	5409
Mpumulanga	965	51	8	0	2	0	216	11	704	37	12	1	1907
Northern Cape	409	78	7	1	10	2	99	2	86	16	5	1	526
Northern Province	866	21	4	0	14	0	362	9	2893	69	31	1	4170
North West	1006	42	20	1	56	2	169	7	1136	47	25	1	2412
Western Cape	1557	88	9	1	2	0	17	1	174	10	11	1	1770
Total	**11048**	**41**	**160**	**1**	**310**	**1**	**1357**	**5**	**14145**	**52**	**168**	**1**	**27188**

Source: Ibid

TABLE 6

NUMBER OF SCHOOLS WITH TOILET FACILITIES

Province	With *)	%	Bucket System	%	Without	% of total	Awaiting Verification	% of total	Total
Eastern Cape	4299	73	66	1	1468	25	49	1	5880
Free State	2329	80	12	0	492	17	48	2	2881
Gauteng	2150	96	3	0	52	2	28	1	2233
KwaZulu Natal	4777	87	27	0	523	10	82	2	5409
Mpumulanga	1650	88	8	0	230	12	19	1	1907
Northern Cape	465	89	41	8	13	2	7	1	526
Northern Province	3657	88	10	0	370	9	133	3	4170
North West	2210	92	19	1	134	6	49	2	2412
Western Cape	1604	90	149	8	6	0	11	1	1770
Total	**23141**	**85**	**335**	**1**	**3288**	**12**	**424**	**2**	**27188**

*) The types of toilets included here are: flush system to main sewer, flush system to septic tank, ventilated improved pit, and pit latrine. Source: Ibid

RURAL SCHOOLS

In the Eastern Cape, the majority of rural schools are multi-grade schools which suffer from poor infrastructure, overcrowding and a lack of curriculum resources. Some are extremely isolated, with poorly qualified and poorly trained teachers.

> *There is a huge backlog of classrooms, and unsatisfactory buildings in rural areas that won't be improved in a decade, and an absence of effective teaching and learning in most areas.* Interview with Interviewee No. 5, February 2000

The children attending these schools are children for whom there is no alternative educational provision. Schools without hostels are dependent on the department's ability to provide transport as some pupils live long distances from the schools.

> *Most of the children here live about 18 - 20 kilometres from the school. As a result when they come to school in the morning, especially the Grade 1's and 2's, they feel like sleeping. They are tired. Previously the children started here at the age of 10 years but with the transport subsidy they could start school at the age of seven, which is the correct age for them to start.* Interview with Interviewee No. 6, February 2000

Some of these schools are located on farms. A child's attendance at these schools will depend on the farmer. If the farmer wants to take his sheep or goats to the dip, children will not be going to school on that particular day. The amount of time for teaching and learning is therefore variable. In the period up to 1994 when there was no teaching and learning taking place in some schools, farm schools which were some distance from the political activities, were functioning

normally. Disturbances, if they occurred, would be isolated events. Members of the governing bodies of these schools tend to be illiterate farm workers. Their involvement in school matters is dependent on the farmer's willingness to release them from their work.

Rural schools receive information through departmental circulars as the vast majority of schools have no telephone. Electricity, if it exists, is usually provided by a third party, e.g. the farmer or the church. In the rural areas it is common for schools to collect rainwater as there is no running water. Pit toilets are the norm.

Kallaway (1998) argues that there is little evidence within South Africa's current priorities for policies which emphasise African rural development. Within this policy framework, he believes the issues of equity and redress within the rural population is becoming increasingly ignored. Kallaway's concerns for the rural poor extend beyond South Africa. He argues that there is a need to avoid looking back at the 1960's vision of ideal peasant societies in China and Tanzania, and to take a realistic look at the appalling neglect that now seems to characterise international educational policy for rural populations in developing countries. Kallaway believes the problem is disregarded by national governments and until recently by international agencies, and is off-loaded on to impoverished rural communities in the name of political devolution. Kallaway also questions why the debate on strategies for vocational education in Africa which were aimed at linking the school curriculum to the world of rural work, has been muted in recent years, when there is considerable evidence to show that there is an overall decline

in access to secondary and tertiary education and in the prospects for finding alternative employment in the formal sector. In particular, Kallaway refers to the report by the National Education Policy Investigation (NEPI) in 1993 which pointed to the need for fresh initiatives to draw upon local knowledge to empower rural peoples. It is evident to Kallaway that these recommendations have been largely ignored in the reconstruction of education in South Africa. Inhabitants of the rural areas or those engaged in agriculture and farming have had little or no say in the changes that are about to be implemented in the educational system. For Kallaway there is now an urgent need for special attention to be given in post-apartheid South Africa to the education of rural peoples and to the orientation of the school curriculum to the needs of rural societies as part of the transformation of the country. The emphasis on the rural peoples needs to be both realistic and credible and in direct contrast to the government's response during the apartheid era. Kallaway questions the present policies of the South African government because of its insistence on equality for all in the field of education (i.e. an equalisation and redress of opportunities to ensure a more equal distribution of educational resources) and because, at the same time, the government's 'Growth, Employment and Redistribution' (GEAR) strategy potentially pulls in the opposite direction, i.e. specialisation and selection rather than the construction of a high quality system for all. Kallaway believes that the latter misses the whole point about the role of education-society relations in twentieth century Africa which should include a

> *curriculum that manages to bridge the gap between developing primary, analytic and critical thinking skills... and at the same time allows for the empowerment of those who are marginal to the modern economy, like rural youth.* Kallaway 1998, pp. 35,36.

Kallaway's view is mirrored by Cleaver (1997) who, in a study for the World Bank, highlighted the fact that the poorest are often ignored in (national) development programmes and that there is a need to establish safety nets for the rural and urban poor. The study identified the need for an adjustment to the World Bank's global development strategy so that national health, education, population and nutrition programmes are expanded to include services for the rural population.

Nasson (1984) argues that it is the farmer's control of the school which is the pernicious influence; were the state to assume control of farm schools the problems would be resolved. Christie and Gaganakis (1989) argue that the state and farmers are in partnership so it does not matter who controls the schools. Graaff (1991) argues that state control of farm schools is a necessary but insufficient move, and even if the state were to assume full control of farm schools there would be no guarantee that the shortage of finances for rural education would end. It is self-evident to Graaff that the partnership between the state and the farmers has failed to bring about the kind of changes needed to improve rural schooling.

Graaff argues that in the sparse literature analysing farm schools in South Africa, three theoretical models have been used. (Nasson, 1984 and 1988; Christie and Gaganakis, 1989; and The Department of Education and Training, 1986).

Two of these, used by Nasson and Christie and Gaganakis make farm schools extensions of the social conditions and the political economy of the farms themselves. The third, espoused by the Department of Training follows an educational perspective and analyses farm schools as an extension of the African school system and not the farm.

> *While the first form of analysis suggests that no transformation of rural schooling can take place outside a complete change in the social relations on the land, the second form implies that tinkering with variables internal to education will improve schooling.* Graaff, 1991, p. 221.

Common to all three models is the high levels of educational poverty in farm schools, and the recognition that few rural schools are benefiting to the same extent as urban schools which have always been better resourced. In the townships, the books are already in the schools. Many have telephones and electricity. Schools in the rural areas do not have either facility.

In Graaff's view all three theoretical approaches neglect the socio-economic conditions within which farm children grow up. For Graaff, these conditions are responsible for the substantial regional variations (across South Africa) in the quality of farm education and these conditions need to be taken into account in developing a new education system. Farm children's academic performance partly depends on the nutrition, stimulation and the support their parents can give them. Often farm workers are unable to provide these. Graaff argues that

> *...it is not the facilities in schools which make the difference in terms of children's access to school in rural areas, but the social and economic environment in which these children find themselves.* Graaff, 1991, p. 230.

All three theoretical approaches ignore the fact that the state should be addressing the socio-economic environment from which farm school pupils originate. Graaff believes that this is more important than anything else. In the Eastern Cape there are intermittent feeding programmes run by the department of education. When they do function, food is only provided for the youngest children, i.e. Grades 1 to Grade 4. The children receive bread with peanut butter and juice. In most cases this will be all the children will have until they return home.

Graaff believes that pre-schools are important components of any envisaged change. For Graaff pre-schools can provide a great deal of the nutrition, the intellectual stimulation and the adjustment to school discipline which children from poor backgrounds lack. Pre-schools also free mothers to take up employment and supplement household income. Legislation to improve the employment conditions of farm workers is also seen by Graaff as essential.

> *Without organisational changes that will give farm workers and people living in rural areas a platform to voice their demands, the prospects for farm workers and farm schools under a post-apartheid dispensation do not look particularly rosy.* Graaff, 1991: 236

It is clear from the above account of the context of the Eastern Cape that the province represents a unique challenge to those responsible for the provision of education within it.

CHAPTER 4

THE CHALLENGES FACING THE DEPARTMENT OF EDUCATION

> *Transition is reflective of an interregnum which refers to a situation where stepping into the 'new' era with a broad vision of social reconstruction and equality is continuously impeded by the ghost of the old structures of power and domination. The emphasis on 'transition' also points to existing attitudes about possibilities of change in the 1990s.* Kallaway, 1997, p.70

INTRODUCTION

The newly elected provincial government faced a number of major challenges in 1994, which were to have a delimiting effect on the effectiveness of the new administration. These challenges had their origins in the historical, political and socio-economic context of the region, chief of which was the need to restructure the six different education departments, and the restoration of a learning and teaching culture in Eastern Cape schools. Other challenges included the lack of resources and capacity at all levels, the need to establish a single finance and personnel system, and an education management information system, the creation of a corporate identity and single value system and the elimination of patronage, nepotism and corruption within the province's employment practices. The new department's transformation agenda was infiltrated by the actions of the largest teaching union, the South African Democratic Teachers Union, (SADTU) and by the fact that the new bureaucracy included poor managers and an ineffective workforce, many of whom were absorbed from the previous homeland administrations.

THE MEANING AND NATURE OF TRANSITION

Whilst the major focus of this chapter is on the huge challenges of implementation, it begins with a discourse around the meaning and nature of transition and education transition in the context of South Africa's journey from authoritarian rule to democracy.

In Adrian Guelke's *South Africa in Transition – The Misunderstood Miracle* (1999) reference is made to O'Donnell and Schmitter's study of transitions from authoritarian rule in which transition is defined as the 'interval between one political regime and another' (p.1.) They stress that transition is a period of uncertainty in which

> *not only are (the rules of the game) in constant flux, but they are arduously contested; actors struggle not just to satisfy their immediate interests and/or the interests of those whom they purport to represent, but also to define rules and procedures whose configuration will determine likely winners and losers in the future.* (Guillermo O'Donnell and Philippe C. Schmitter, 1986, p. 6, in: Guelke, 1999, p.1)

Applying this definition of transition to the situation in South Africa, Guelke argues that the transition was the period between the two political systems of liberalisation in 1990 and its democratisation in 1994, i.e. with President de Klerk's announcement on 2 February 1990 of the unbanning of the ANC, and culminating in the inaugeration of Nelson Mandela as President of South Africa on 10 May 1994 after the democratic elections. Guelke regards the events post 1994, the period of this study, as nothing more than the outcomes of the election. The author develops his argument by describing the late 1980s as an impasse, as a

time when there was a recognition of the country's political stagnation, and as a time when there were many commentators advocating the need for far reaching change. The author consequently characterises the transition as a passage from white minority to African majority rule. He also refers to the notion of transition as a deal between the races on reconciliation and transformation, i.e. whites were offered reconciliation and forgiveness for their complicity in the crime of apartheid in return for their support for a programme of transformation designed to ensure that those who had been most disadvantaged under apartheid would receive the help they needed to avail themselves of the opportunities that South Africa had to offer – so transition is seen as a compact that benefited black and white. Guelke writes in 1999 that negative views of the South African transition are relatively rare, and that any comments of this nature tend to arise out of the proposition that the transition has produced little or no change in the living conditions of the majority of the population.

In *Processes of Transition in Education Systems*, by McLeish and Phillips, (eds), (1998), McLeish defines education in transition as

> *a passage from one system of education to another over time, the educational transition process [being] characterised by considerable uncertainty and chaos, especially in the early stages, following the necessary and crucial shift in ideology.* p. 20.

For McLeish, progress in the political transition taking place within the country plays a central role in the restoration of some degrees of order and certainty to the process of educational transition. With the help of the model designed by McLeish and others and reproduced as Figure 13 below, the author

describes the processes occurring in recent transitions from authoritarian to democratic government. The model, which appears to have its roots in Bîrzea's (1994) five-phase political transition process, comprises a series of

> *discrete, interrelated phases, which define the process of educational transition in countries moving from authoritarian rule to democratic government. The starting point is the authoritarian system. The depiction of this system as a closed circle [is intended to represent] the essence of such systems in which, traditionally, the rules and regulations governing society are not only well known, but strictly enforced, with the result that a large degree of certainty .....is ensured.* Ibid., p. 14.

> *The insecurity and anxiety engendered by the ideological collapse is reflected in the model by a widening of the circle. Thus from Phase I onwards, the circle is replaced by increasingly flattened arcs, characterised by growing gaps in the 'shell'. This is designed in the first instance to depict the uncertainty and chaos which would appear to form part of the transition process from authoritarianism to democracy, and later the variety of attitudes, actions and beliefs which characterise the increasingly democratic society and its educational establishments.* Ibid., p. 17.

National and Provincial elections, Phases II and III of the model, not only shape the nature of the new educational system, but also act to alleviate some of the chaos and uncertainty. Guelke's definition of transition would mirror Phases I - II of McLeish's definition, but would not extend beyond it. McLeish argues that educational transition is neither easy nor simple to delimit.

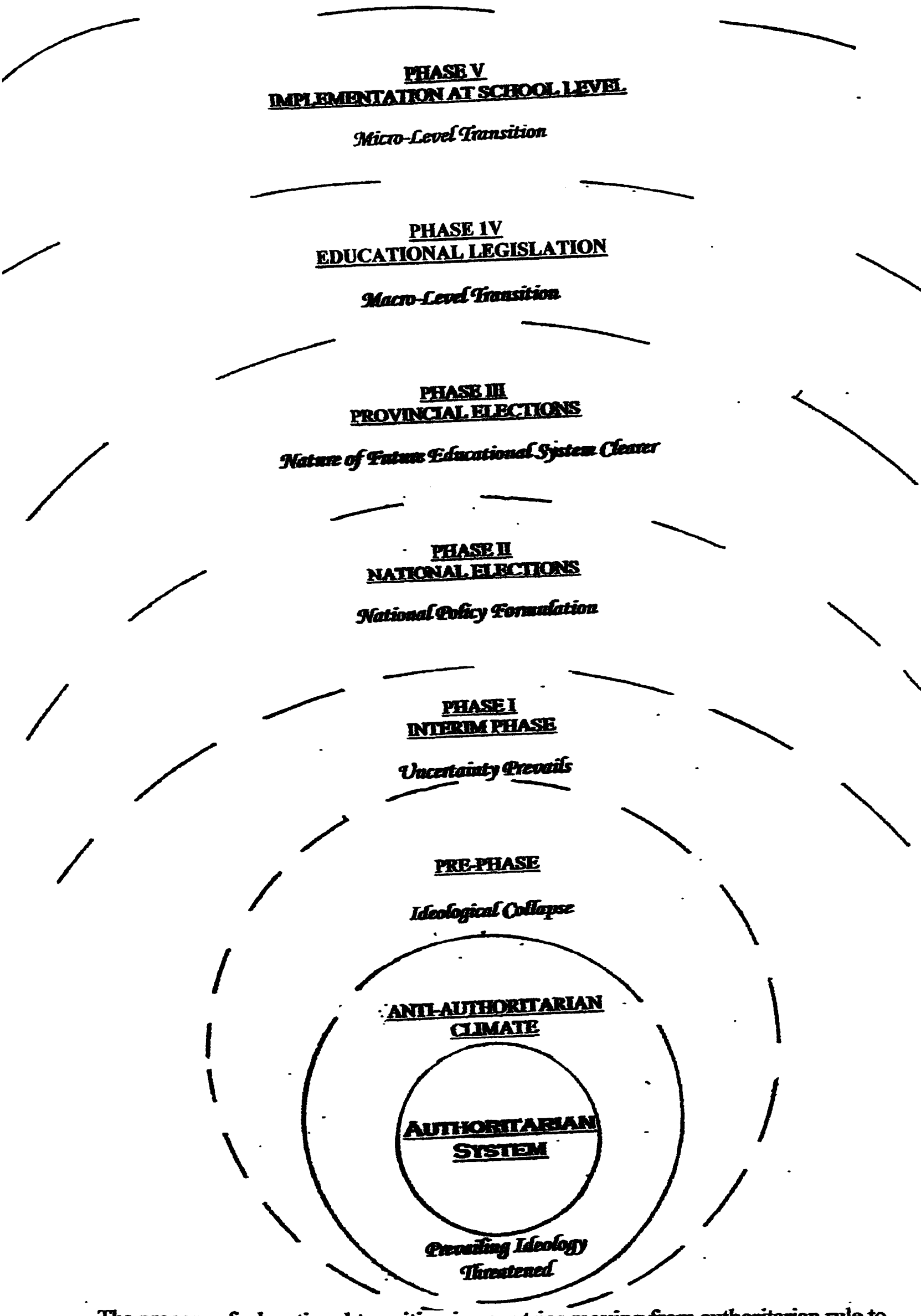
> *[Whilst] it may be relatively straightforward to identify the process of political transition as the primary catalyst....to determine both a finite start and end to the educational transition process is somewhat more difficult.* Ibid., p. 18.

McLeish suggests that the end point be subdivided into two parts, namely macro level transition and micro level transition which culminate in Phases IV

and V of her model. The former is concerned with the design and adoption of new educational structures and practices, which McLeish argues can be completed in a relatively short period of time. The same she states cannot be said of micro level educational transition which she sees as an extremely lengthy process, as

> *at this level we are concerned not only with individual schools, but with individual teachers and pupils within those achools, ...the fifth and final phase being devoted to the implementation of new educational policies.* Ibid., p. 19

In *Education in Transition: International Perspectives on the Politics and Processes of Change,* (2002), the editor Rosarii Griffin focuses on the changes which have taken place in education and society over the last century, and in particular on the transitional phase of all such developments over the past few decades prior to the dawn of the new millennium. Most of the more remarkable changes recounted in her book are changes following situations of conflict at a macro level, such as the change from one kind of governmental regime or ideology to another. Transition of education is perceived by the editor as being part of a greater societal change, which involves paradigm shifts in a country's culture, its economics and its societal relationships. Such shifts often perceive education as playing an important role in the formation of a new order, as education has always been seen as a site of resistance as well as compliance, (Freire, 1990).



The process of educational transition in countries moving from authoritarian rule to democratic government. Taken from 'Processes of Transition in Education Systems'. Edited by Elizabeth A. McLeish and David Phillips.

Griffin suggests that within the concept of transition there exists a process, involving a passing or change from one place, state, or condition to another, which she states is distinct from the concept of transformation which she perceives as a sudden or dramatic change. Griffin therefore argues that whilst it has been said that some countries, for example, South Africa, have undergone a sudden change or transformation of sorts, it is her view that these countries' experience of transformation is *de facto* a transition, and that, as such, monumental changes are often slow to impact, and that this is often the cause of considerable anguish. She cites East Germany where the political transition was so rapid that, again, one might conceivably refer to it as transformation, but even now, the East is still readjusting to a new ideological and administrative framework.

The second section of Griffin (op. cit.), entitled "Countries of Conflict and Resolution" looks at societies which have made a transition from one kind of political system to another. Clive Harber's chapter entitled "Education in Transition? Change and Continuity in South African Education" looks at the transition of apartheid South Africa to a liberal democracy and a racially desegregated society. He describes in some detail the violent nature, particularly against women, of this transitional phase. In Harber's words,

> *violence became a way of life in homes, schools and communities...violence became accepted as a powerful means of attaining change, including change within education, and social status was gained by carrying a gun.* (pp. 124-125)

It is Harber's view that this was partly due to the racist, authoritarian regime previously in place, which led to the polarisation of blacks and whites,

particularly in terms of the social and economic situation. The key changes brought about in South Africa were characterised by two main words: decentralisation and democratisation. The 1996 Education Act endeavoured to establish partnerships between all the interested stakeholders in education, particularly between the government, the schools and the local communities. Harber concludes that while change has taken place, it is as yet still at the policy level, and is much slower at the local level, where he states that schools are 'characterised as much by continuity as by change.'

The following extract from Griffin (2002) would appear to summarise, exactly, the place of South Africa within the paradigm of transition, and as such mirrors the approach of McLeish, and the views of Harber:

> *Change in education in countries emerging from situations of conflict, such as South Africa .... can often be very slow and the transition process painful. Traditional ways of life are disrupted and deeply held values are challenged. Compromise is inevitable. The new situation becomes uncomfortable, as the gloss of transition wears thin. However in all sites of resistance, education is a powerful tool when rightly harnessed, to help bring about peaceful and fair transitions. [South Africa is still] emerging from [an] oppressive regime, and has a different and difficult set of complex problems to deal with resulting from its unique cultural context.... For now, suffice to say that education is always in transition, but when whole societies and ideologies are at stake and where policies are in direct conflict with the sociocultural context in which they are being transmitted, then change is often difficult to bring about.* (pp. 27-28).

RESTRUCTURING, AND THE ESTABLISHMENT OF THE FIRST DEPARTMENT OF EDUCATION IN THE POST-APARTHEID ERA

The elections took place on 27th April 1994. The following month, Neela Hoosain was appointed Minister of the Executive Council for Education, Culture

met for the first time in July 1994. It became an interim management team for the new education department with a brief to drive the integration process, to develop a framework for the restructuring of education in the province, to formulate a strategy for the transformation of education in the province, and to ensure the education system continued to operate.

The work of the SMT to restructure the department required formal engagement with all the former Departments of Education. As the work of the Regional Education and Training Forum, pre-1994, had brought many of the Directors of the former departments together, there was within the SMT at least, a broader pulling together around this activity. In contrast, the majority of officials working in the former departments, and the schools themselves, continued to see their relationship with their former departments. For the duration of 1994 and 1995 the education service continued to be provided by the ex-departments, with departmental officials continuing to work under their former senior managers:

> *During the period when the SMT was in place, one didn't get the impression that there was a unity of purpose – there were still old divisions. There was a lot of labelling in terms of the ex departments. Schools did not identify themselves as part of the Eastern Cape Education Department. They still regarded themselves as being part of the old system. They were still very sectarian at that stage.* Interview with Interviewee No. 7, May 2000

The new department was located within the former Ciskei Government buildings in Bisho, where the major activity was the integration of the 6 former departments into a single coherent unit (i.e. the Transkei Department of Education, Ciskei Department of Education, the Department of Education and Training, (controlled from Pretoria), the Cape Education Department (controlled

Education, Ciskei Department of Education, the Department of Education and Training, (controlled from Pretoria), the Cape Education Department (controlled from Cape Town), the House of Delegates (controlled from Durban), and the House of Representatives, (also controlled from Cape Town). As budgets had already been allocated to the former administrations, there were no resources for the new department. It therefore could not purchase anything. Staff seconded to the new department from schools and colleges were expected to provide their own photocopiers, fax machines, computers, and filing cabinets. They were also required to attend meetings of the Education Transitional Task Team which were wide stakeholder meetings. The meetings which were set up by the newly constituted Eastern Cape Education Department in 1994 to manage the transfer of power and responsibilities, became a kind of standing committee on education. Community leaders and other stakeholders would make presentations to that body on a huge array of education matters from designing destruction-proof furniture for schools in the Transkei, to pleas for the registration of pre-primary schools which were religious-based, to qualification authorities wanting to promote their own particular courses to obtain accreditation. Most of the people serving on the ETTT had worked together pre-1994 in the Regional Education and Training Forum workshops. During the first three months, the ETTT meetings took place every Saturday at the Teachers Centre in East London. During the second half of the year, the meetings took place every second Saturday. Individual task groups would meet on alternate Saturdays. Ms Hoosain attended the ETTT as the Education Minister of the Executive Council.

There were also small transitional task teams of about 5 people in each of the former departments with responsibility for managing and delivering the change from the old system to the new system. Prior to the restructuring of the six departments, the former departments were acting as agencies for the new Department. The task team members experienced serious challenges from the 'sitting' officials who felt extremely intimidated by the presence of the task teams, and concerned about whether they would have a role in the new department.

The ETTT gradually faded into the 'woodwork' during the course of that year, as the new department's first Strategic Management Team became more established. Although it is questionable whether the ETTT achieved anything of importance, its value lay in the fact that it provided a forum for all the key stakeholders to engage in consultations regarding the transition process.

Although the new MEC did not have an education background, she took up her post armed with a considerable amount of education policy which had been formulated by the ANC, pre-1994, to ensure that there would be functioning education structures post-1994. Ms Hoosain considered the education policies of the ANC to be a sufficient basis from which any new programs could be brought into place by her SMT. In the formal structure that was unfolding, education stakeholders were brought together in the SMT, as necessary, to achieve consensus and cooperation in the restructuring that had to take place. The ANC, the heads of the former departments, the major teaching union, the South African Democratic Teachers Union and various community structures were invited to become part of the strategic management team. The MEC believed that no

SADTU supported it. As a result the South African Democratic Teachers Union influenced everything, the aftermath being felt for many years.

The stakeholders nominated their representatives to serve in the Strategic Management team. There were 18 representatives on the SMT. As none of the other political parties had stable structures or educational wings, they were not represented on the SMT. The SMT attended monthly consultation meetings with stakeholders in different parts of the province: Port Elizabeth, Umtata, Queenstown, and East London. The MEC had an inner team consisting of eight members of the SMT with whom there would be separate meetings to discuss issues that needed a clear political steer.

During the first few weeks of the new administration, the MEC had to work out of her briefcase as there was no office space. The SMT met wherever a place could be found to meet but later all the MECs were allocated offices in the legislature building. Small focused work teams were established responsible for such matters as crisis resolution, the development of the departmental organogram, finances, and policy formulation. SMT members were assigned to one or more of these teams. During the four/five months following the MEC's inauguration, delegations of people came to her offices on a daily basis with unattended matters from the former, but still active departments of education. For example, there would be complaints about teachers not attending their place of work, and the fact that students were still being denied access to educational institutions throughout the province. Although the former departments were still

problems, (and many others) were now seen to be the responsibility of the new administration.

> *At the time when Neela Hoosain was appointed there were no staff to support her. The South African Churches Higher Education Development Trust (SACHED) attempted to help. It allowed one of its secretaries to work in the provincial office and to look after the MEC as there was total chaos in the MEC's office.* Interview with Interviewee No.8, March 2000

In 1994 the ministers of all the former departments left their positions. It fell to the directors of the former departments to manage their departments and the 1994/5 education budget. However, five of the six heads of the ex-departments, who were now also serving on the SMT, ceased to take charge of their own departments. Once they had physically moved to new offices alongside the MEC, it fell to the ex departments' deputy heads to take charge of running the former departments. In the homeland departments it is doubtful whether there was any professional leadership at that stage. Things had effectively stopped. A limbo condition prevailed, and officials waited for something to emerge from the SMT.

The failure of the national government to devolve all powers to the provinces sooner and to enact a formal handover, meant there were areas of decision-making that were outside the MEC's authority. The new department was unable, for instance, to put in place a formally appointed management team and give them the authority to work. At this time, officials from the former departments actually had more powers, as they were still operating under the legislative arrangements prevailing at the time. A formal hand-over from the previous government would have ensured, if it had taken place, that, an audit of assets and liabilities would have been carried out prior to the elections. The new

department was therefore unable to say what resources it had at its disposal, and what the needs of the schools were. The decision to break all links with the past, whilst understandable, meant that a lot of time was spent trying to find basic information. The MEC also failed to obtain the kind of support she might have expected from the education standing committee. Even though many of the members of the committee were former teachers, there was little understanding around the link between education and development. The standing committee was not sufficiently high-powered or knowledgeable about policy matters.

In 1994 discussions that were taking place at the level of the SMT were not filtering down to local communities. Even though the ETTT and the monthly briefing meetings were taking place, teachers were excluded from the process. It emerged that there was also no consensus within the SMT to facilitate the restructuring process by filling posts. By February 1995 there was still no organogram, no operating directorates, and no directors.

> *I was someone who had held a fairly senior post in the administration of a department, and attempted to say that we needed to take some time looking at creating a functional organogram. Her response was that this was something trivial. We will just appoint people and I'll tell them to do their job.* Interview with Interviewee No.7, May 2000

The reason given for the MECs dismissal in January 1995 was that she was inaccessible and only worked with a select group of people. Her legacy was a set of targets that were set for the restructuring of the different departments, the identification of budgetary priorities, the review of legislation which either had to be abolished or repealed, initial planning around an organisational structure for

the new department, and preparations for the establishment of an overarching examinations authority.

The only national policy document to guide the new provincial department was the first White Paper on Education (1995). Representatives of the new department attended all the national meetings, conferences and workshops around that piece of legislation which was promulgated in 1995. The SMT managed to produce by mid June, under the leadership of a new MEC, a policy document outlining the overall approach of the office of the MEC and her SMT. It managed to do that within six weeks of coming into office because of the work that had been carried out in the non-formal education sector, by the RETF, and the ANC's education desk.

Although there was a considerable amount of policy thinking and discussion about education policy in Ms Hoosain's SMT, when she was replaced by Nosimo Balindlela at the beginning of 1995 there was nothing one could call policy. Ms Hoosain's SMT left the department by June 1995. The ex-Departments were disestablished by an Act of Parliament in 1995. Although there had been no legal basis for those Departments to operate they had carried on working to ensure there was not total chaos. In April 1995 the first Permanent Secretary, Dr Ronnie Van Wyk, was appointed. An organogram became implemented gradually during the course of 1995 and the beginning of 1996 with the assistance of the Public Service Commission. This body acted as the human resources section of the new provincial administration. Its work included the appointment of the first directors of the new education department. Five deputy permanent secretaries were

appointed during 1995. They were Nangamso Mgijima, Geoff Malamlela, Sugar Makina, B. B. Mabandla and Hennie Franzsen. Regional directors were then appointed to the newly created regional and district structures, and the whole process then cascaded down through the department. This was achieved over a period of six months so that by early 1996, the basic structures were in place. By the end of 1996, the transition from the old structures to the new structure was complete, tentatively anchored on the beginnings of a common personnel system.

When Mrs Balindlela came into office, she immediately broadened the management structure so that there was an Education Transistional Task Team (ETTT) comprising different education stakeholders in each of the six Regions and 41 Districts. Within each ETTT there was representation from the district education office, NGOs, the teaching unions, and from the community. There was an ETTT at every level (District, Regional and Provincial). Each ETTT acted as an advisory or steering group to the new department, with its advice, recommendations and concerns filtering upwards and downwards as appropriate. However, once the new Department became properly established, it took the view that the ETTTs were no longer required, and the ETTTs ceased to exist. At the time, many stakeholders decried this action to wind down the ETTTs as they recognised the critical importance of proper consultation, participation and the need for ownership by stakeholders at every level in the effective implementation of policy. The work of the ETTTs had forced a partnership between the Department and the community, and created during its short life, something which

had been part of the country's struggle politics, namely broad-based representation.

The appointment process, facilitated initially by the Public Service Commission and then by the new directors, was hyper-democratic. Representatives of all the stakeholders insisted on being involved in the interviews for every senior position. The ANC were represented on the selection panels as were the unions: SADTU; NEHAWU (the National Education and Health Workers Union); SAPSA (the South African Public Servants Association); CICSA (the Ciskei Civil Servants Association), and the PSA (the Public Servants Association). It was the era when years of activism in the struggle were rewarded, and that happened at every level. Returning political exiles expected public service posts in the new administration. They argued that experience should mean all relevant experience, not just administrative experience. Some former activists believed strongly that they were more entitled than others to be employed because they had been in the struggle. There was a large amount of posturing in support of this position at this stage, with the SADTU a significant player. It resulted in the performance of former activists being taken into account in the selection process. Selection criteria for the new positions in the provincial government were written in such a way to accommodate these 'returners'. Some of them became activists overnight in order to secure positions within the new administration. Although these people were inexperienced in the area of educational administration or indeed any other form of administration, they started filling positions. Others who had something to offer in terms of relevant experience were sidelined. Much

important experience that had built up, albeit in an administration based on an apartheid ideology, was lost. People were brought into the administration without training and it came as no surprise to anyone that they were unable to respond to the needs of the people they were supposed to be serving:

> *The new department was created against the backcloth of a lack of administrative experience and the fact some resourceful people were sidelined. They were clearly political appointments because their qualifications do not allow them to be there.* Interview with Interviewee No.5, February 2000

Below the appointment of the Deputy Permanent Secretaries, the Public Service Commission played a purely monitoring role in the appointment of staff to the new department. The Permanent Secretary and his deputies were responsible for all other appointments. SADTU and senior officials of the former departments of the Transkei and Ciskei who were members of the Strategic Management Team were keen to see their former colleagues secure positions in the new administration. Many young teachers with no administrative experience took advantage of the situation and acquired positions in the new department at head office and within the regional and district offices. SADTU attracted these former teachers and college leavers to its membership. A large number of new officials were employed. Many of them were appointed because of their political affiliations and alignment to certain unions or organisations. When they came in to work, some of them just sat down and did nothing. They had no idea what they were supposed to be doing.

The Sunset Clauses were introduced and brokered by the late Joe Slovo who introduced guarantees of jobs to the former civil servants of the previous government for the five years of the first parliament. The Sunset Clauses impacted significantly on the new department as they had the effect of diverting resources away from programmes aimed at redress for black children. The legacy of the Sunset Clauses in the Eastern Cape was an incredibly bloated bureaucracy and civil service, as civil servants in the former departments and homelands not appointed to the new administration were carried additional to the core establishment. So the new provincial administration effectively remained bloated until the Voluntary Severance Package was born in 1996. From 1996 civil servants were offered voluntary severance packages. White and black officials with the greatest experience responded and left the department.

It will not be easy to change the education system in this province because the organisational structure was not set up to be efficient. It was set up in the context of guaranteeing jobs for those people who were in the civil service before this government was set up. So if you are bringing together six former departments of education into one institution without shedding anybody you are bound to create a cumbersome structure because you are accommodating everybody when in fact not everybody is needed to perform a particular function. Interview with Interviewee No.10, March 2000

We were given the huge task of combining six different ex-departments of education into one and that in itself created an excess or supernumerary staff, because each of the different departments had people doing the same job. Interview with Interviewee No.11, April 2000

ABSENCE OF A CULTURE OF LEARNING AND TEACHING

> *By the early 1990's high hopes had been raised about what changing education could be expected to deliver. It was hoped that change would simultaneously benefit the previously disenfranchised and marginalised and improve the quality of education for all. There was the perception that the culture of teaching and learning had broken down in many black, and especially urban sectors of society, and it was hoped that radical changes to the education system would restore it and revitalise the whole field after the disaster of apartheid education.* (Morrow and King, 1998: xii)

In the aftermath of the liberation struggle and the evolving of democracy in 1994, the new educational structures and the schools in the Eastern Cape exposed their 'unpreparedness' for the new liberal environment and for the challenges which lay ahead. This unpreparedness manifested itself in the form of fire-damaged and burnt-out buildings, and a severe shortage of books and curriculum materials. It also manifested itself in 1994 in the form of poor student discipline and teacher absenteeism, both of which, pre 1994, were expressions of solidarity and defiance against anything that emanated from the apartheid government. During that era it was the students and the teaching force who were the activists. As it was their task to disrupt the teaching and learning process, teachers failed to acquire the basic pedagogical skills they would have witnessed on a daily basis in a 'normal' school environment.

> *During those early days of the struggle in the 1970s and 1980s, it was more like teaching a person how to ride a motorbike. This is where we want to go, and if you want to pull this thing down, you must ram it with this motorbike. Then came 1994, there was nothing to drive against in 1994. All the walls were down, but the people were still on the motorbike. They did not understand how to switch off the motorbike.* Interview with Interviewee No.1, March 2000

The clarion call to students and teachers alike in 1994 resulted in large numbers of children returning to their schools, but for head teachers the message fell far short of what was needed. The perception in many local communities was still one of distrust for school principals who had been the instruments of the previous regime. In the eyes of the school principals, the ANC failed to galvanise its activists to support the process of normalisation and to positively influence the return by learners and educators to normal schooling. Following the arrival of democracy there continued to be a disrespect for structure and for authority. Teachers continued to be deliberately subversive and rebellious but now it appeared to be for their own personal interests. At the same time students arrived at schools with little motivation to learn and with a mindset to defy teachers.

> *During the transition - the impression we got while we were working on the strategic management team was that there were significant areas of the Eastern Cape, where little or no schooling took place. Teachers drew salaries but seldom had to teach. The teacher ethic - work ethic wasn't there. We have a percentage of teachers who do not go to work or who do not stay at work, because they are doing something else. There is no effective teaching and therefore no effective learning.* Interview with Interviewee No. 12, February 2000

Harber (1998) sees the largest obstacle to educational reform in South Africa as the collapse of the culture of teaching and learning in schools. He cites a report of the national Task Team on Education Management Development which noted that

> *the .... crisis in schools can be attributed to the lack of legitimacy of the education system as a whole, stemming from decades of resistance to apartheid and resulting in the discrediting of many conventional educational practices such as punctuality, preparation for lessons, innovation, individual attention and peer group learning.* (Department of Education, 1996c quoted in L. Buchert, (Ed.), 1998, Education Reform in the South in the 1990s, (Paris, UNESCO.)

Chisholm and Vally, 1996, found there to be a serious lack of professionalism, high levels of absenteeism on the part of teachers and pupils, and a lack of teacher motivation. In their study of sixteen schools in Gauteng province they reported that one school principal commented that teachers had no knowledge of what a culture of learning and teaching might mean as they had spent their entire lives in disrupted schools. He also spoke of poor class teaching, no marking, no tests given and no teacher appraisal. School pupils surveyed as part of the same study referred to a lack of respect by teachers for one another and for students, by a lack of co-operation and divisions among teachers, sexual abuse, harassment of pupils, absenteeism, the use of corporal punishment, and drunkenness. (Chisholm and Vally, 1996b, p.31 quoted in L. Buchert, (ed), 1998, p.84.

The period of the first MEC was perceived by the school communities to be one of confusion. Learners were returning to school in large numbers and continued to do so into the period of the Balindlela administration. Many were adults responding to the call to resume their studies. The flood of returning students placed pressures on school accommodation. In local communities children of secondary school age were accommodated in surplus space in primary

schools. Overcrowding became the norm as schools ran out of space and teachers. They had heard the promises of 'the government in waiting' about free education and the supply of school books, and expectations were high and unknowingly unrealistic. People appeared to have also forgotten very quickly where the country had come from, the baggage it was carrying from the past, and the backlogs. As a consequence, a considerable amount of pressure, some unrealistic, was placed on officials in the department to deliver. Immediately the department was plunged into a crisis as delegation upon delegation started to stream to the head office. Some officials were held hostage.

> *There was an instance when I was called to a school between East London and King Williams Town and they refused to release me unless the department agreed to provide them with new classrooms. In 1995/96 we had many delegations coming in on a daily basis. People expected the political leaders to keep their promises and that was not easy to do.* Interview with Interviewee No 13, March 2000

Schools became nothing more than buildings where children could communicate and teachers could get in touch with them. Teachers in black primary schools were in general under-qualified, so were not accorded serious professional status. The primary curriculum was bereft of anything that resembled a science and technology component. Part of the reason for this was that teachers had to teach without basic resources. Some books were provided by the department but not at a level which could adequately meet the needs of the number of children in the schools. The students had secured the freedom but there was no change in the schools. There was also little evidence of more resources going into schools or education department intervention around the control of

students and teachers. Armed with little or no guidance from departmental officials, and in many cases still perceived by parents and students alike as 'sell-outs' to the former apartheid regime, school principals struggled to take control of their schools and take them forward. In some schools, teachers and students formed a nucleus against the leadership of the school. Hardened by years of activism, the students started controlling everything in the former DET and former 'Homeland' secondary schools and the culture of teaching and learning gradually collapsed. During school hours children were seen roaming the streets. School principals had no control over their students or teaching staff. The banning of corporal punishment was used by principals as an excuse to allow a laissez faire situation to prevail in some schools, and as a consequence there was a total breakdown of discipline in many schools.

In the remote areas of the Eastern Cape least affected by political activity, the school system was already dysfunctional and the culture of teaching and learning precariously placed. A typical school in the middle of the Transkei started teaching a week into term and finished teaching two weeks before the end of term. Pass rates were low. Children arrived at school at ten, teachers were frequently absent, and student drop-out and repetition rates were high.

The national department sought to develop interventions to address the problems in the country's secondary schools, which was aimed at building a totally new culture in the schools. They launched a campaign to revive the 'Culture of Learning and Teaching and Service', (COLTS), in its schools. This campaign which was intended to refocus minds was met with ambivalence by

Eastern Cape schools, who complained about a lack of support from provincial officials when they attempted to implement the initiative. The campaign to change the ethos in schools was met with resistance from the teachers who were being deliberately subversive. In some cases it was for their own personal interest, where it remained profitable for them to still regard themselves as 'revolutionaries.'

Teachers knew they had the support of the South African Democratic Teachers Union. Many incompetent teachers joined SADTU for protection. Teachers became extremely unionised. Basic concerns with bread and butter issues replaced any convictions teachers may have had about their social responsibilities to the education system. Lateness, drunkenness, and irregular teaching were commonplace in Eastern Cape schools. Principals began to abdicate their responsibilities to run schools, as they became paralysed with fear of the unions. SADTU's relationship with the Department became more adversarial and this was creating serious problems, exacerbated further by the redeployment issue which was to become protracted and act to further demoralise an uncertain teaching force. It was during this period that SADTU made it clear that Education Development Officers would not be allowed to enter any schools to carry out inspections.

Overlaid on all of this was the government's new curriculum - *Curriculum 2005* - which was gradually being introduced into schools. For the lifetime of the first parliament, the majority of secondary school grades continued to operate the old curriculum. One of the challenges revolved around the need to provide the

learner support material for the new curriculum. With no resourcing to support this initiative an already demotivated teaching force responded with little enthusiasm or interest:

> *In many of our education departmental offices, there is a chronic absenteeism of officials, appointments are not honoured, punctuality is not observed, phones ring without being answered, files and documents are lost, letters are not responded to, senior officials are inaccessible, there is confusion about roles and responsibilities and very little support, advice and assistance is given to schools... Many of our parents fear their own children, never check the child's attendance at school, are not interested in the welfare of the school, never attend meetings, give no support to the teacher or principal.... Many of our teachers are not committed to quality teaching, their behaviour leaves much to be desired, are more interested in their own welfare, are not professional and dedicated, are never at school on time, pursue their studies at the expense of the children, do not prepare for lessons... Many of our children are always absent from school, lack discipline and manners, regularly leave school early, are usually late for school, wear no uniform, have no respect for teachers, drink during school hours, are involved in drugs and gangs, gamble and smoke at school, come to school armed to instil fear in others.... Many of our principals have no administrative skills, they are the source of conflict between students and teachers, sow divisions among their staff, undermine the development of their colleagues, fail to properly manage the resources of their school, do not involve parents in school matters. This has resulted in chaos, poor decisions, lack of imagination and a total collapse of the education system in many schools.... Many of our schools have no electricity, no water, no toilets, no libraries, no laboratories, no furniture, no classrooms, no teachers, no buildings, no windows, no pride and no dignity.* Mkhatshwa, 1997, p 14-15 (Extract from a speech made by the Deputy Minister of Education in 1997 at a conference about the Culture of Learning, Teaching and Service Campaign: from Griffin, 2002.)

Juxtaposed to this, the ex-Model C schools (semi-privatised state schools in the former white only, middle class areas) were flooded by families from previously disadvantaged communities. Township schools, which had been the

site of the struggle, came to serve children from a wider community, including the informal settlements.

LACK OF RESOURCES

During the apartheid era, there were huge disparities in the way resources were allocated across the departments with the predominantly black departments and self-governing homelands of the Ciskei and the Transkei receiving smaller allocations per pupil.

TABLE 7

PER CAPITA EXPENDITURE BY FORMER DEPARTMENT, 1994

Former Department	**Rand**
House of Assembly (for whites)	**5 403**
House of Delegates (for Indians)	4 687
House of Representatives (for coloureds)	3 687
QwaQwa (African – homeland)	2 241
Department of Education and Training (African – Apartheid S. A.)	**2 184**
Ciskei (African – self governing)	**2 056**
Venda ((African –self governing)	1 792
Gazankulu (African – homeland)	1 699
KwaNdebele (African – homeland)	1 595
Bophuthatswana (African – self governing)	1 580
Lebowa (African – homeland)	1 549
KaNgwane (African – homeland)	1 480
KwaZulu (African – homeland)	1 459
Transkei (African – self governing)	**1 053**
Average	**2 222**
Source: Department of Education (1995). Report of the Committee to Review the Organisation, Governance and Funding of Schools, p. 15.	

The challenge for the new government was the establishment of an equitable funding scheme system which would direct more resources to the poorest schools. The apartheid legacy meant that the problems of inequity would

be significant as there would be no instant solution in terms of addressing the significant inequalities in financial resourcing.

> *In the Eastern Cape the pockets of privilege relative to the massive under-development of the province amount to 260 schools out of nearly 6000. Whilst in theory it is possible to take the resources of those historically privileged schools and spread them across the rest, it won't make a millimetre difference to the levels of resourcing in all the other institutions.* Interview with Interviewee No. 4, March 2000

In 1994, the new Eastern Cape Department of Education had nothing. There were no offices, furniture, no incumbents in posts and no budget. It had to effectively start from scratch. The lack of resources and personnel created a 'no win' situation. The new department inherited huge infrastructure problems, e.g. poor condition of school buildings, and large numbers of schools without power, water, sanitation and telephones. There was insufficient money for basic facilities, curriculum resources and for the renovation of the schools that were burnt down or vandalised. The funding available to the department only allowed for the delivery of some books and for minor renovations to take place. No school furniture was provided during the period of the first parliament. The department came to rely on the support it received from NGOs and donor countries. The Japanese government and the European Union are presently funding the building of schools in the former Transkei region of the province. The department's limited resources have barely funded its programme of repairs to school buildings damaged by tornadoes.

Much of the work the department became engaged in was around the setting up of systems, the development of policy, and the training of officials to

contend with the challenges around the new legislation and the new policies. One of these challenges was around the implementation of Curriculum 2005. The challenge for the department was to put sufficient quantities of learner support materials into schools. With no budgetary provision from government, the department was unable to provide sufficient resources to implement these policies.

The ANC came in on a ticket of free education. As the magnitude of the country's needs become clearer, free education came to mean free reception year education. Later it was taken away completely as there were insufficient funds to do even that. Schools have therefore come to depend on parental contributions to fund basic resources. Many parents refused to pay these monies, saying that they were told that education would be free.

Many officials not absorbed into the new department did not resign because the Sunset Clauses guaranteed their posts, and nobody contacted them and offered them work. Many stayed at home, reporting to the District office only as required. In 1994 there were a few thousand of them who continued to be paid until the voluntary severance packages became available in 1996. By 1998 the number had reduced to 300. Within this total were the school principals and teachers who had been forced out of their posts by the local community.

TRANSFORMATION OF THE CIVIL SERVICE

Within the framework of the restructuring, there was a desperate need to refocus the minds of civil servants on the notions of efficient and responsive

public service, and to instil in them the notion of a single cohesive culture. To transform the Civil Service in South Africa, the government in 1995 launched its BATHO PELE or People First campaign: the focus of public service was to be the people, irrespective of personal feelings and attitudes. Unfortunately, the change in ethos depended on the extent to which the administrative and political heads of the Department were able to interact with each other and influence the system. During the lifetime of the first parliament, successive MECs and Permanent Secretaries demonstrated their inability to work together. Moreover, section heads were not strong enough to instil in their staff the government's culture of work ethos, and insufficient time was given to the development of middle management to address these systemic problems.

Many of the administrative officials were simply absorbed into the new system. A close analysis of the Public Service today in the Eastern Cape will confirm that the bulk of it are former Civil Servants of the Ciskei and Transkei Departments of Education. They came into their new posts, without an adequate job-description, not knowing what to do, each with their own culture of work, work ethic and systems. Officials from the homeland and DET administrations also came with a track record of not being able to deliver, and it was these officials who now formed the bulk of the new Department, at virtually all levels, and especially at the point of delivery in the district and regional offices. There was also an interesting phenomenon in that the office systems employed in a district office invariably followed the systems used by the majority of staff at any given local office, and these systems were accepted *de facto*, by the remaining

staff as the way things were to be. The support system to schools was not configured to support or to enable. Officials rarely visited schools. Therefore delivery did not take place because of the lack of capacity and the lack of will on the part of these officials.

> *When the whole infrastructure of the regional offices and the district offices started to fall into place, it was most emphatically not the case that there was a sense of purpose, and that things were happening in a purposeful and systematic manner. Administrators were working in a way which replicated the systems that were in place prior to 1994.* Interview with Interviewee No. 14, February 2000

The system included poor managers, and administrative officials who did not have the capacity to discharge their responsibilities, and with no monitoring system to detect deficiencies. The majority of these people were located in the district and regional offices for whom there was a total lack of understanding of what it meant to be a public servant. A file could sit on a desk for 6 months or a year and be unattended to.

> *They don't seem to grasp that there's a person behind that file, and that what they do not do has an impact upon that person. I would have to say that this kind of dehumanisation is probably a product of the previous way in which black people were treated.* Interview with Interviewee No. 14, February 2000

The system in the Eastern Cape was set up in such a way that schools could not go directly to the regional office. They would have to consult first their district officer who would refer it on to the regional office, and if appropriate, the regional office would take the matter to head office. A regional manager was perceived as nothing more than a postmaster. Schools were required to collect stationery and materials from the district offices because the district officials had

no transport. Guidance to schools was provided by the department in the form of circulars, which the rural schools had to collect from their district office.

> *The machinery to implement policy initiatives is extremely weak. There are 6 huge regional offices, 41 district offices, all dysfunctional except for one or two regional offices and ten district offices - that is an on the ball district manager who knows what is going on in the schools and intervenes actively to approve things and officials actually visit the schools. Most of the district offices are dysfunctional.* Interview with Interviewee No. 5, February 2000

The perceived ineffectiveness of the provincial department of education to deliver an effective education service is contrasted with the important role played by Non-Governmental Organisations (NGOs) from 1994 as the providers of basic services.

> *In an ad hoc way officials in the new department began to work on certain policy related issues. The World Bank had been conducting some research in the Eastern Cape which led to the evolution of Eastern Cape policy documents on Early Childhood Development but apart from that we had to start from scratch in terms of developing our own policy in the department, developing our own curriculum framework. For me the greatest challenge was within the ECD Directorate, early childhood development because there was nothing there, there was no structure, there was no policy, and a huge demand for that service. So much pressure was being put on the department to deliver in that particular area. If you remember there was no provision amongst the black communities as far as early childhood development was concerned. By the time National Development developed a national curriculum framework we had already developed our own curriculum framework here in the province and I was using NGOs because I discovered that there was a lot of expertise within them.* Interview with Interviewee No. 9, February 2000

Many NGOs had been established during the apartheid era, and to varying degrees had a record of sustained and effective work outside the government's systems. Preston (1996) refers to the important and direct role played by NGOs in assisting major donor organisations to bypass inefficient or corrupt Third World

state machines, and Harber (1997) to assisting schools to become more democratic through the development, for instance, of effective dispute and conflict management skills.

THE CHALLENGE OF THE SOUTH AFRICAN DEMOCRATIC TEACHERS UNION AND ITS IMPACT ON THE EDUCATION SERVICE

On 5th October 1990, the South African Democratic Teachers Union was launched in Johannesburg. Ten years later, SADTU claim to have a mixed membership of 53,000 teachers and departmental officials in the Eastern Cape. As its membership includes the majority of the province's black teachers, black schools are significantly affected by employer/union disputes. SADTU is therefore part and parcel of all the province's education structures. It is clear from the evidence collected as part of this study that during the chaos and confusion of the immediate transition, SADTU exploited the poverty of the new government. In the poverty vacuum of the provincial administration which followed in 1994, SADTU rapidly achieved a position of authority in the province. This led to role confusion and to increasing doubts in the minds of school principals about who was actually running the province's education services. Its links with the ANC gave the union a political orientation which came to replace its trade union roots. Its failure to recognise the critical importance of the professional relationship that ought to exist between the teacher and the student, meant that SADTU became a contributor to the poor discipline in schools.

Site committees led by the SADTU representative became extremely influential in schools. They were perceived by teachers and students to have more authority than the principal. As a result there were many principals who abdicated their responsibility as the accounting officer of the school. Principals felt they could not take decisions unless they consulted the site committees, many of which were not properly informed. In some schools the site committees ran the schools.

Between 1994 and 1999 there was no supervision in the classrooms. The Union effectively banned visits by inspectors to schools. Other officials rarely attended the schools and in the absence of any tangible support or intervention by the department, the Union dictated what could happen and what could not happen in schools. The new department came to be exploited by teachers and the unions as the department was unable to exercise its authority, particularly in relation to improper conduct and incompetence of its staff. Teachers came to school but seldom taught, and children dragged their feet and did whatever they wanted to do. In my view the government's campaign of restoring a culture of learning and teaching in Eastern Cape schools was seriously undermined by the actions of SADTU from the outset. The failure of the ANC education desk and the political and administrative leadership in the province to intervene effectively to wrench control away from SADTU did much to contribute to the lack of development in the province's schools during the lifetime of the first parliament.

THE ABSENCE OF A SINGLE FINANCIAL, PERSONNEL AND EDUCATION MANAGEMENT INFORMATION SYSTEM

During the transitional period when the six departments were still operating as agencies, the new department found it very difficult to put in place proper financial systems or financial controls. As a result there was serious over-expenditure and financial mismanagement. Some of the former education departments did not have any proper financial management systems in place, so there were no proper means of checking and monitoring the use of funds.

A further challenge for the new department, therefore, was the need to rationalise the separate financial systems of the former departments into a single system. They had been operating totally independently of each other.

> *The analogy is of a department operating three separate financial management systems and trying to fly an aeroplane with no instrumentation. Got no idea where they were going, at what height, came to crash pretty badly and it's taken three years to recover. The department [would] overspend by almost a billion rand and it didn't know it was overspending until about a year afterwards.* Interview with Interviewee No. 4, March 2000

During the apartheid era, the Head Offices of the former departments were not located in the Province. The white/coloured components of the education systems had their head offices in Cape Town, the Indians' head office was in Durban, and the DET had its head office in Pretoria. As a result there were no education management information databases in the province. Although the national department had the legal function of `mopping up' or transferring all

information from the ex-departments to the new provinces, attempts were made by members of the Balindlela administration to secure information for planning purposes. This proved to be virtually impossible because all the Departments at that stage were in various stages of disestablishment. As this information was critical to future education planning in the province, it became a major challenge of the new department to establish an Education Management Information System.

CHANGE OF ETHOS AND THE INTRODUCTION OF A NEW VALUE SYSTEM

There was an urgent need to change the ethos in the bureaucracy overseeing the school system and to develop a corporate identity and corporate culture as labelling in terms of the former departments continued to exist in 1994/5, and to counter the ingrained practices of patronage, nepotism and corruption. Labelling continued to the point where staff were still expressing their loyalty to the office they were working in, instead of seeing themselves as members of the new Department of Education. As a consequence there was no unity of purpose. There was a desperate need to refocus the minds of teaching professionals and civil servants on the notions of efficient and responsive public service, and effective teaching and learning. Furthermore, the style of educational administration in the post-apartheid era needed to change. In the past the administrative system was essentially a control mechanism, coupled with the need to spread the country's resources in such a way that certain groups of people and certain areas were better resourced. The challenge for the new department was to

introduce a more facilitatory style of working within and across the administration.

In the new department there was incompetency, and a lack of efficiency mixed with a reluctance to provide information - a kind of passive resistance. Some officials appeared to be deliberately stalling the process by doing absolutely nothing. Senior officials in the new department saw it as the survival tactics of people who had learned the power of patronage which managers in the education system had become used to over the years. Senior management in the former departments had been in a position of patronage. They could appoint, transfer and promote people, and they were hoping that by not cooperating with the new administration they would have the space to continue doing that. There was an expectation that this might carry on because it had been the norm.

The challenge at the time, therefore, was the promotion of a new value system which could be instilled in people across the education system to counter patronage, corruption and nepotism.

In the former Transkei there were 'Ghost Schools' which were included in all the returns to the former department. Financial allocations would be made to the principals of these schools. This continued up to 1999. Principals would submit uplifted figures in relation to their pupil enrolment return. Corruption was also discovered amongst officials working in the head office. Similar practices were uncovered in relation to the deaths of officials whose salaries continued to be paid out every month to corrupt colleagues.

> *A teacher would find at the month end that there had been a deduction of about R900 for a loan he/she had not taken out. The investigation that followed found that there was a syndicate of people from Home Affairs working with officials from the personnel and finance sections of the education department. The official from Home Affairs had created the I. D., and officials in the Department of Education had produced the pay slip for that I.D. Cash would then be secured through a loan taken out in the name of the teacher whose salary would be deducted on a monthly basis.* Interview with Interviewee No.15, April 2000

On occasions the appointment process for posts within the new department led to the appointment of a candidate who was related to somebody on the panel or to someone already working in the department. Interviews were considered by many to be window dressing only.

CONCLUSION

The legacy of the apartheid system was such that the challenges inherited by the new government pervaded every level of the school system. The Education, Management and Development Task Team (EMD) established by the South African Government and UNICEF in 1994 identified the following challenges which needed to be overcome to enable the goals of improved learning and teaching in a transformed education system to be realised. These challenges included the inheritance of:

- Dysfunctional structures;
- A mix of old and new styles of management and work ethos;
- Insufficient appropriately skilled people;
- An absence of an appropriate work ethos and management vision to drive integration and delivery;

- Insufficient clarity with regard to roles and responsibilities within and between levels of management;
- Inadequate systems and procedures;
- Poor coordination of resources;
- Inefficient and ineffective delegation;
- Crisis management in response to immediate problems rather than planned development.

At school level, the task team (1996, p. 20) identified the following management and governance challenges:

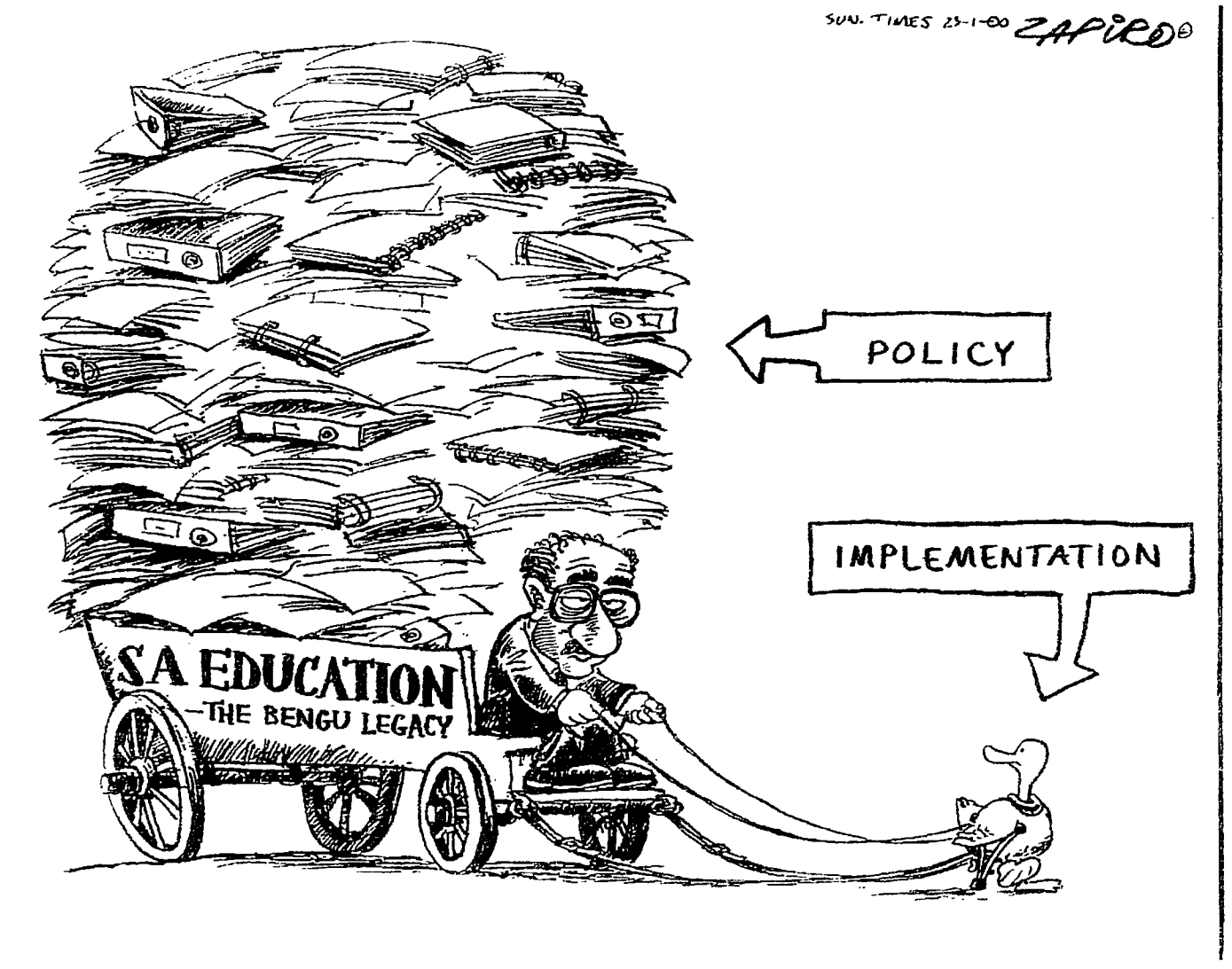
- Lack of clarity with regard to roles and responsibilities;
- Lack of legitimacy of principals, schools' management teams and inspectors;
- Poor working conditions and physical resources;
- Inappropriate management structures and systems support;
- Lack of experience of good management practices;
- Uneven levels of experience and capacity in governing bodies;
- Lack of understanding in the community about the role of governance in education management;
- Inequalities and disparities in resources and capacity.

The vision which was subsequently shaped by government is set out in a number of policy documents including discussion documents, green papers, white papers and laws governing education. In 1995 the ANC set out its Policy Framework for Education and Training. This was followed shortly by white papers on Education and Training in 1995, and Organisation, Governance and

Funding of Schools in 1996, which set out the principles and framework for a non-racial education and training system based on basic human rights, democratic governance, access and equity, justice and accountability. These papers were followed by the South African Schools Act in 1996 and National Norms and Standards for School Funding in 1998, and the Admission Policy for Ordinary Schools in 1998. Through these policies the government sought to overcome these challenges and transform the education system in South Africa. Assisted by its universities, think tanks and policy research units, and inundated with international and intellectual aid from Australia, the UK, the USA and New Zealand in the years following the end of apartheid in 1994, the country appeared to possess a significant resource base for achieving educational change. The chapter which follows explores the extent to which the department of education in the Eastern Cape was able to implement the government's policies and in so doing achieve educational change.

CHAPTER 5

POLICY FORMULATION AND POLICY IMPLEMENTATION



Source: *Sunday Times*, 23 January 2000

INTRODUCTION

This chapter continues the historical discourse from Hoosain's dismissal in early 1995, through the period of Nosimo Balindlela's and Shepherd Mayatula's tenures as MECs for Education from February 1995 to April 1999, and concludes with an exploration around the dynamic of policy formulation and policy implementation as it was played out in the Eastern Cape, with reference in

particular to Outcomes Based Education (OBE) and Special Education. It is the author's opinion that readers of this section will be assisted by the historical analysis which follows in their interpretation and assessment of the policy and delivery issues in the province.

THE BALINDLELA ADMINISTRATION

Ms Hoosain's SMT was dissolved in 1995 and Mrs Balindlela established her own strategic management team and her own working groups. Mrs Balindlela prioritised the finalisation of the organogram, as it had become evident that the lack of structure and co-ordination was impacting negatively on the new department's administrative procedures and on delivery. It became the task of two of the department's task teams to complete the organogram and oversee the selection and recruitment of staff to the department. Unlike her predecessor, Mrs Balindlela had an education background, and was an extremely able public speaker, committed to meeting the needs of the children. Mrs Balindlela was instrumental in successfully campaigning for children to return to school. She sought, wherever possible, ways to motivate children to study and to drive the learning process forward.

Dr. Ronnie Van Wyk was appointed - first, to an acting position as Head of Department and then to the permanent position in April 1995 to lead Balindlela's administration. By June 1995 five Deputy Permanent Secretaries had been appointed. They were Geoff Malamlela: Finance and Administration; Nangamso Mgijima: Curriculum Development; Hennie Franzsen: Standard Education; B.B. Mabandla: Regional Co-ordination and Sugar Makina: Arts,

Culture and Sport. Some of the new deputy permanent secretaries brought with them experience from the former departments.

> *Nosimo has a wonderful gift of relating to people. She certainly brought an enormous amount of hope to most of us who were looking for progress and direction. She had the ability to take the stage at first-world schools and third-world schools and have the audience eating out of her hand. I've seldom seen anyone so effective in the new South Africa. It was because of the message, and because of her understanding of where people came from. She could understand the whites and their fears. I remember distinctly she came off an aeroplane straight from the airport to Sterling Primary School to open a beautiful media centre and she stood up and persuaded the whole audience to look into the future with optimism. I don't think she ever tried to whitewash or to pull the wool over anybody else with regard to the problems that we were facing. She appealed for understanding and she had the ability to get that understanding from various people. So there was real leadership taking place. I often said she was the greatest asset we had. She was so creative and so visionary, that sometimes the bureaucratic administrative sections were panting to keep up with her. She'd come back from a community and the officials would struggle to deliver what she had said.* Interview with Interviewee No.16, March 2000

The appointment process below the level of the deputy permanent secretaries included a search for people with experience in education, but former activists with no previous experience of educational administration demanded to join the department. As the need for a smooth transition was paramount, some former activists with no previous experience of educational management were indeed appointed to positions in the department.

The decision to appoint Dr Ronnie Van Wyk, a white Afrikaner and academic from the University of Port Elizabeth was an essential part of the plan to achieve a smooth transition, but in accepting the post of Head of Service, Dr Van Wyk was perceived by the Afrikaner community as someone who had effectively

sold out his birthright. It fell to Mr Franzsen, one of the five deputy permanent secretaries to represent Afrikaner interests in the Eastern Cape.

> *As far as the initial senior appointments were concerned, there was insufficient guidance from the national government in terms of assisting provinces with issues, many of which were anticipated at a national level. Colleagues in the provinces were left without sufficient guidance. So the provinces managed the processes very differently. In some cases there was an over-reliance on experience in terms of making these appointments, in other cases experience was thrown out of the window, and the provinces just wanted new people to come in. In some cases political pedigree was more important than actual technical competence.* Interview with Interviewee No. 4, March 2000

> *I would say it was a good move [to appoint Dr. Van Wyk] because it gave a very clear message that this is not a black education system, or a black government or a black department. It's a department for all South Africans based in the Province.* Interview with Interviewee No.12, February 2000

From the outset, expectations on the new education department were immense. Most of its energies were spent on fire-fighting and managing crises. Although the change from the Hoosain administration to the Balindlela administration did not bring the stability and improvements which were hoped for in 1995, the leadership began to put structures into place and get people in posts, and the whole infrastructure of the regional offices and the district offices began to take shape, primarily to accommodate the large number of officials that had to be absorbed in the new department. The new structures included 6 regional offices and 41 district offices, most of which were ineffective and dysfunctional from their inception. The organisational structure of Head Office, Regional and District Offices and schools which was designed to deliver an improved education service in the province created a long management chain. It also created some significant

functional overlaps and some significant gaps in the assignment of responsibilities. This in turn created confusion both within and outside the department and among stakeholders and the wider community, about the responsibilities and functions of senior staff.

Although the district offices were well placed to understand local issues, and were established as the point of delivery and support to schools, they were weak in terms of specialist support and management capacity. Professional support to schools, in the form of subject advisory services, special needs specialist staff, school guidance counsellors or school psychologists was missing. The district offices were headed by managers who were recruited from schools. They tended to be school principals who lacked the experience to take responsibility for the district offices. Too frequently their response to issues was that it was somebody else's problem, and therefore the issue had nothing to do with them.

> *Presently we have district/circuit managers responsible for 25 to 30 schools. There are various other people at lower levels, withdrawing from pedagogical issues, withdrawing from teaching and learning and focusing all their energies on administrative and bureaucratic processes as somehow these seemed to have a higher status. People would say that the manager sits in an office – pushing paper around, saying I don't get my hands dirty with teachers and learners in schools and that kind of thing. So effectively the department was failing to provide any significant support, oversight, supervision, to teaching and learning processes in schools. We were just concerned with appointments and disciplinary procedures and budgets.* Interview with Interviewee No. 4, March 2000

They were given no budget or the authority to intervene and support schools. As a consequence, the district officers became 'second class citizens' in the administration. As only 18% of the province's schools had telephones,

communicating with institutions was a problem. The district officer's position in the management and support chain was therefore critical but with an insufficient number of vehicles available at a district level, schools seldom saw a district official. Delivery was either ineffective or non-existent.

The regional offices, which had the major monitoring and planning function were unable to carry out their role as they were located long distances from the schools and because they were unaware of what was happening on the ground. They became nothing more than 'post offices' located between the head office and the district offices, as all departmental matters had to pass through these offices, en route to Head Office. As such, they became the bottle-neck in the system. Information dissemination stalled in either direction in these offices. Not surprisingly, there was an increasing sense within the community of schools that the department was adding no value to the schools of the province.

> *In the districts [offices] you have ...people who manage to take up the cases of teachers and take those to the regions [offices] but when the case of a teacher gets into the region [office] that is where everything stops. If you go to the region and ask about these things, they will say it is in Bisho. You go to Bisho and they say there is nothing to see.* Interview with Interviewee No. 15, April 2000

> *So... the one thing they [the regional offices] have done is to hinder the process of strengthening capacity at district level and block the tightening and refining of the education service to the schools.* Interview with Interviewee No. 2, February 2000

The Balindlela administration became known for difficulties around clean administration and basic communication to schools and within the department, for ad hoc decision-making, for a failure to establish proper financial and personnel systems, and for tensions between former Ciskei and Transkei SMT members. Dr

Van Wyk and Mrs Balindlela also reached a stage where they were finding it difficult to work together. Balindlela was an educationalist in her own right and had been *de facto* administrative head of the Department as well as the political head for a few months before Dr Van Wyk was appointed. Some doubted her willingness to completely relinquish that role.

There was also evidence of excessive expenditure and inadequate controls which added to the precarious state of the department's budget. This budget paid for additional (and unnecessary) secondments of staff from schools to the department, for departmental officials being unnecessarily accommodated overnight in hotels, and excessive catering arrangements for departmental functions.

> *I wondered whether it was all part of the euphoria of being democratised and free. I know for a fact that people like the MEC and the Permanent Secretary, those of the top echelon were trying their utmost to put a curb on this and to introduce controls. But the Department was so big and the ripple effect was so great that before you wiped your eyes, you noticed that somebody else had been put up in a hotel. These things were not sanctioned by the senior staff.* Interview with Interviewee No. 16, March 2000

> *The sort of thing that one finds so incredibly frustrating is the wastage of money. During 1996/97, the department was bringing officials in from the district offices, putting them up at the Holiday Inn in Summerstrand, Port Elizabeth for up to 6 months at a time, to train them in the Regional office. The cost was phenomenal. Once they had finished their six-month stint, another group of officials would arrive.* Interview with Interviewee No.14, February 2000

As the weeks and months went by, the challenges became greater. Children had returned to the schools but there was overcrowding and insufficient numbers of teachers. Delegations arrived in Bisho on a daily basis demanding

improvements in education provisioning in their areas. Driven by these continuing demands, rising expectations and the huge political imperative in the Eastern Cape to show the wider community that the department was actually addressing the equity issue, over 4000 new teaching posts were created in the province. The department did this in a deliberate attempt to reduce pupil teacher ratios in the former Transkei, but they did so without proper financial planning, without an effective education management information system, and without a plan for managing a reduction of excess teachers in other parts of the province. Most importantly they did so without adequate funding and without realising the consequences of their decision on the department's budget.

In 1996 the department also uncovered building projects, briefed and sanctioned by the former departments of education, at different stages of construction, valued at R25 million in the former Transkei, and R12 million in the Ciskei for which there was no financial provision. Central government funding (Reconstruction and Development Programme) intended for such backlogs was never committed, primarily because the department lacked a management information system to guide their decision making. The department continued to experience on-going difficulties with financial management, partly because of budgetary constraints, but mostly because of mismanagement and lack of capacity. In addition to the difficulties caused by over expenditure, no financial provisions were made in several important service areas, including funding for reception-age children in schools, for the additional weighting for learners with special educational needs, for peripatetic educators of physical education and

music, teachers at hospital schools, teachers at the teachers centres, computer centres, art schools, museum schools, and technical centres. In 1996 the Deputy Permanent Secretary (Finance) left the department. By March 1997, the department was facing a huge deficit and a massive financial crisis. As a result the national government imposed a Section 100 Notice on the Province, which effectively removed their powers to commit expenditure. By 1997, from the original group of five Deputy Permanent Secretaries, only Franzsen remained in the department. Dr. Van Wyk went off on extended leave at the end of 1997. Upon his return after only a month of a three month period of leave, Dr. Van Wyk was prevented from resuming his duties. As the accountable officer, he was held responsible for the financial difficulties facing the department. Franzsen became acting Permanent Secretary for three months. Shortly after, Mrs Balindlela left the department. Although Dr. Van Wyk only left the department in March 1999, he had been effectively sidelined for a full year after he ceased to be the acting Head of Department.

> *I would say an esprit de corps, a cohesiveness, and a desire to achieve was visible in 1995. Then in 1997 there was tension. The Permanent Secretary was not removed from office, but he was sidelined, ending up in an office, on his own, doing no departmental work. This caused a sort of insecurity, eventually ending up in a sort of ineffectiveness.... I would say the biggest problem in 1997 was instability within the department and fear for the future.* Interview with Interviewee No.17, February 2000

> *The Balindlela administration was a sad chapter within the history of the department. It was a department in crisis from the beginning, and various people paid the price for trying to manage it. There was lots of internal conflict and distrust. The simplest of decisions became sensitive. There was nothing that was ordinary and normal, and everything had to be debated.* Interview with Interviewee No.4, March 2000

The Financial Legacy of the Balindlela Administration

The Section 100 Notice was introduced by the national government in 1997 as the province had, by then, revealed its incapacity to manage its own financial affairs. The Section 100 Notice placed a moratorium on new appointments and required the Province's Finance Department to manage, control and disperse all departmental budgets. Individual departments were required to request resources as they needed them.

The notice had the effect of strangling the activities of the education department. As the Finance department received no increase in its manpower, a huge backlog in terms of payments was created, to the extent that the business community lost its confidence in the Province's ability to pay them. As the non-payment of bills increased, the electricity supply to individual schools and district offices was interrupted and then cut off.

> *In Umtata, the department did not pay the rent and eventually the district officials were evicted from the building, and they were put into a building where there was no furniture, no telephone, no electricity. So the staff just sat there.* Interview with Interview No.18, March 2000

Contractors were not paid for services or work carried out for the department, and teachers who left the system failed to receive their pensions. Legal action against the department was still pending in 2000 for monies owed by the department in relation to the payment of relocation expenses, the payment of examination marking fees, and agreed increases in salary.

The Section 100 Notice had a negative effect on the morale of both education department officials and teachers. The debt which had accumulated as a consequence of the appointment of the 4000 additional teachers and of the school building programme had to be repaid, and they became the first charge against the department's budget. There would be no decentralising of budgets until this had occurred, and not until the department had demonstrated its ability to manage its finances properly. The balance of the departmental budget was assigned to the payment of salaries. Funding for non-personnel items was consequently extremely limited.

TABLE 8 Provincial Education Spending on Non – Personnel Items

	1995/96	**1997/98**	**1999/00***
Eastern Cape	9%	15%	5%
Free State	10%	11%	12%
Gauteng	16%	12%	13%
KwaZulu-Natal	19%	9%	10%
Mpumalanga	13%	8%	10%
Northern Cape	31%	11%	19%
Northern Province	11%	10%	5%
North West	17%	11%	9%
Western Cape	12%	15%	13%
ALL	**14%**	**12%**	**9%**

* Budgeted

Source: Department of Finance, 1998 Medium Term Expenditure Review, Budget Office, 1998; Department of Finance, Intergovernmental Fiscal Review 1999; Department of Education, personal communication April 1999 and May 2000.

The period of real depression was June/ July 1998 through to June 1999. The lights were still going out in the schools. So even now things have not really improved – except for the fact that there's policies now in place – there's the will to do things, but it can only change when the new budget comes into place, and that will be in April. In 1998/9 95% of the budget went on salaries. For non-personnel items we were left with 452 million rand. We had to repay the debt from past years, and that left us with an operating budget of 25 million rand. Most of that debt has been paid now. So at least we will have an operating budget. The salary situation has also improved. From 95% we are now citing 85%. The Minister was citing figures for the departmental debt at the end of 1997/98 of R1,143 million, which had reduced to R580 million by the start of the 1999/2000 financial year. During 1999 /2000 a further sum of R223 million was directed to debt repayment. So from 1,143 million, the debt now stands at R357 million. We were in such a financial quagmire, that the department of finance was told to control the finances. That didn't apply to education only, it applied to the whole province and so we had to requisition for funds each time – all government departments had to do that. Interview with Interviewee No.18, March 2000

THE MAYATULA ADMINISTRATION

Professor Shepherd Mayatula was Minister of the Executive Council with responsibility for the Provincial Administration's Finance Department from 1994 to February 1998, and was therefore a key player during the lifetime of the first parliament. Following the departure of Mrs Balindlela in 1998, Professor Mayatula was appointed MEC for Education, and as the political head of the department, he provided the political leadership during the two administrations which followed Dr. Van Wyk's dismissal. As the Section 100 Notice had already been invoked, the decision was taken to replace Mrs Balindlela with a politician who had a financial background. As the department's financial difficulties

continued, the moratorium affecting the appointment of teachers remained in place. The absence of any substantive leadership at Head Office resulted in a further dysfunctioning of the education service, with the regional directors proceeding to fill the leadership vacuum and attempting to take control of most aspects of education delivery. The district offices continued to see their relationship with Head office rather than the regional offices, and amongst this confusion there were no great strategic developments, no step forward and little impact was made on the province's schools during this period. In contrast there was increasing uncertainty about the future of the Eastern Cape's education service among both the teaching profession and the civil service. Mayatula's major achievement was to control education spending, to prepare a plan for the repayment of the debt and to stop the department from collapsing. In these matters he was successful.

> *I was there to do a job, not to be nice. I was there to make sure nobody spent any money because of the financial mess the department was in and so I knew that I would be unpopular.* Interview with Interviewee No. 19, May 2000

Jonathan Godden, and then H. M. Tsengiwe covered the interregnum before Jonathan Godden's permanent appointment as Permanent Secretary at the start of the second parliament in 1999. Jonathan Godden came first, at the beginning of 1998, and he acted as Permanent Secretary for six months - he left in June 1998. Jonathan Godden was replaced by H. M.Tsengiwe in July 1998 who stayed in office until the end of the first parliament in March 1999.

In February 1998, Godden was seconded to the Eastern Cape department of education from a United Kingdom-funded education project for three months in an acting capacity as Head of Department whilst the permanent post was advertised. Many legal problems surfaced to hold up the advertising process, so Godden continued in post for a further three months. The United Kingdom's Department for International Development confirmed that they would not agree to any further extensions beyond the end of June as it had become evident that Godden's absence was beginning to threaten the future of the Imbewu project, a joint British and South African government initiative to improve the capacity of teachers and educational management in hundreds of the Eastern Cape's most impoverished primary schools. At the end of the six month period, Godden left the department. During his brief stay in the department, he oversaw the appointments to the second tier of leadership in the department. These appointments included: Nosipho Skenjana as Chief Director for Education Provisioning and Management; John Carneson as Chief Director for Planning and Research, and Zama Tom as Chief Director for Human Resources.

> *I did not want the burden of leading the department on a permanent basis as I did not believe there was sufficient political understanding and support for the problems of the department, and because I was convinced that people were looking for a scapegoat... I'd inherited the relationship where the [Education] standing committee was part of the response of people being absolutely frustrated and despondent about what to do. And the way they used to respond was to hammer anything to do with the education department. So my first meeting with them when I was new – I had no idea of the background - I just walked straight into a severe hammering.* Interview with Interviewee No. 4, March 2000

The fourth appointment at that level, Peliswa Ndikane, as Chief Director for Finance, was completed after his time. As there was no one filling these posts when Godden came into the department, and the legal dispute around the previous Head of Department remained unresolved, there was no leadership in any shape or form in the department when Godden took up his temporary post.

> *Following the departure of Mrs Balindlela and Dr Van Wyk nothing much was achieved. Godden came in and set up task teams. I remember I headed one of the teams which was to focus on Effective Teaching and Learning. Ray Tywakadi led a team to look at Public Relations, and Zama Tom headed a team on Human Resource Development. He then gave them timeframes – in three months you must have a strategy for Effective Learning and Teaching, and then another three months for implementation, and then he left. Those plans were never implemented.* Interview with Interviewee No.18, March 2000

When Godden left, the Premier's office brought in Tsengiwe who had been Head of the Public Service Commission in the Eastern Cape, to take over as another temporary Head of the Education Department for a period of eight months.

> *Had it not been for the fact that I had a contract with the government, I would have thought twice before I took this on. My work at the Public Service Commission was coming to an end in any case and duty called. Even though I had been a teacher by profession and a principal of a high school, I certainly had anxieties. This department had already got rid of two MECs and I was the fourth Permanent Secretary within a space of four years, so I was certainly anxious.* Interview with Interviewee No. 24, March 2000

As the legal dispute around the resignation of Dr Van Wyk was still unresolved no permanent appointment to the post of Head of Department could be made. So the outcome was a further interregnum after Godden's departure.

Tsengiwe came in as another stop-gap measure at a very difficult time. From June 1998 up to the time that Godden was appointed again following the elections in 1999, the department effectively stood still.

> *Nothing happened in any sphere of education during that whole period because there was no money in the kitty, we had no budget – besides the personnel budget, and there was a debt to be paid which we had inherited from our earlier days. So, no school building, no programmes. We sat in our offices. If it was not for the National Department in that period, this department would have closed down. As we didn't have a cent to operate, things came to a halt. All of us kept hoping that it couldn't be like this forever. We kept saying that something had to happen in education, and wondered whether education would collapse in this province if we all left. This was the toughest period we went through. Much more so than when we started. That was the bottom of the trough.* Interview with Interviewee No. 18, March 2000

POLICY DEVELOPMENT/SERVICE DELIVERY

> *By the early 1990s high hopes had been raised about what changing education could be expected to deliver. It was hoped that change would simultaneously benefit the previously disenfranchised and marginalised and improve the quality of education for all. There was the perception that the culture of teaching and learning had broken down in many black, and especially urban sectors of society and it was hoped that radical changes to the education system would restore it and revitalise the whole field after the disaster of Apartheid education. In the context of such hopes and perceptions...it was understandable that the new government would launch an ambitious program of developing human resource policy at a breakneck pace. ...These policy developments have been inspired by multiple aims, from redressing the injustices of the past and the redistribution of educational resources, to attempts to reconceptualise what is meant by educational quality and the simultaneous achievement of equity, development and global competitiveness.* Morrow and King, 1998 pp. xii-xiii.

It was against this backcloth of huge expectations and a crisis situation in South African schools that the new government established commissions, task teams and committees to provide the policy statements which were to be the

building blocks for a new democratic education system, and which were to provide the equally new provincial administrations with huge challenges in terms of implementation and delivery. These policy statements are briefly reviewed in this chapter as are other national developments in education like the Ithuteng Campaign (Ready to Learn), and the campaign to restore the Culture of Learning and Teaching Service (COLTS).

The following section relies heavily on the work of Steward Mothata, (2000) Joint Editor of Critical Issues in Education.

Various commissions were established. These commissions produced reports on: higher education (the National Commission on Higher Education submitted its report, 'A Framework for Transformation' which became embodied into the Green Paper on Higher Education in December 1996); special education (the National Commission on Special needs in Education and Training (NCSNET) and the National Committee on Education Support Services (NCESS) presented its report 'Quality Education for All: Overcoming Barriers to Learning and Development' in November 1998); and gender equity (the Gender Equity Task Team's report of 1997 resulted in the establishment of a gender equity directorate in the Department of National Education). More importantly there have been, since 1994, a succession of education white papers, each focused on different areas of education reform. The first white paper on education and training published in 1995 provided the policy direction, values and principles for the new education system including an integrated approach to education and training, an outcomes based approach, lifelong learning, access to education and

training for all, equity, redress and transformation. The second white paper entitled Organisation, Governance and Funding of Schools was published in 1996. It was based on the proposals of the Hunter Report which recommended that:

- there should be only two types of schools – public and independent;
- each public school should have a governing body consisting of representatives from the parent body, pupils in secondary schools, teachers, non-teaching staff, the principal and the community, which would make decisions on school hours, codes of conduct, subject choices, budgets and fund raising;
- Model C schools should become public schools and all land and fixed assets should revert back to public ownership;
- all parents would pay a compulsory school fee, the actual amount determined by their income;
- no child should be excluded from the compulsory education phase (the first ten years) because of non-payment of fees;
- attention should be given to the provision of transport and accommodation subsidies for pupils in rural areas;
- provincial budgets should include a 'redress fund' to assist schools which were disadvantaged by past policies;
- funding should be made available for capital development to be allocated by provincial authorities on the basis of an index of need;
- an education management information system and an education management training institute should be established.

These recommendations formed the basis of the South African Schools Act 84 of 1996 which included guidance on the governance of schools, the roles and responsibilities of school governing bodies, the employment of teachers, learners with special educational needs, and parental rights. The third white paper, A Programme for the Transformation of Higher Education was published in 1997 and was born out of the work of the National Commission on Higher Education, and formed the basis for the Higher Education Act of 1997. It legislated in terms of governance of higher education, student financial support, and student access. There followed a further white paper in November 1997 on An Integrated National Disability Strategy which proposed the integration of disability issues into all government development strategies, planning and programmes.

These white papers have been followed by a series of Acts including the

- South African Qualifications Authority (SAQA) Act 58, 1995
- Labour Relations Act 66, 1995
- National Education Policy Act 27, 1996
- South African Schools Act 84, 1996
- Education Laws Amendment Act, 1997
- Higher Education Act 101, 1997
- Higher Education and Training (FET) Act 98, 1998
- Employment of Educators (EAA) Act 76, 1998
- Employment Equity Act 55, 1998

Of these Acts, the National Education Policy Act 27, 1996 and the South African Schools Act 84, 1996, have the greatest relevance to the implementation issues being raised as part of this thesis. These two Acts provide for:

> *the determination of national education policy by the Minister of Education in accordance with certain principles; consultations to be undertaken prior to the determination of policy and the establishment of bodies for the purpose of consultation....; the publication and implementation of policy; and the monitoring and evaluation of education. Two policy documents were published following the passing of this Act. They were the National Norms and Standards for School Funding (Notice 2362, 1998 which detailed the extent of state subsidies to independent schools, fee charging and fee exemption policy in state schools and the Resource Targeting Table based on conditions in schools and the poverty of their communities, and the Admission Policy for Ordinary Public Schools (Notice 2432, 1998) which detailed school zoning, admission requirements, repetition of grades and registers of admissions.....The ...[South African Schools] Act includes stipulations regarding: admission to public schools; ages for compulsory attendance; discipline; language policy in public schools and freedom of conscience and religion in public schools. Guidelines are provided for the establishment and maintenance of public schools; the status of public schools; the composition, powers and duties of school governing bodies; the closure of public schools; funding of public schools; and payment of school fees.* Mothata, 2000 p.11

The Ithuteng Campaign was launched in 1996 as a national pilot programme for Adult Basic Education and Training (ABET). It called for the efficient delivery of high quality ABET programmes aimed at improving literacy levels throughout the country in public, non-governmental and private sectors. In 1997 the campaign to restore the Culture of Learning and Teaching in Schools (COLTS) was launched. The main elements of the campaign included:

> *All teachers and learners have to work a full day, five days a week and a full term. Teachers have to prepare for classes and learners have to do their work; all schools must have access to basic resource packages (renovation and refurbishment of school buildings and proper equipment) to make meaningful learning and teaching possible; all governing bodies have to be elected and provided with the necessary education and training to govern schools effectively; and weapons at schools are banned and a campaign against drugs, rape, sexual harassment and all forms of criminality at schools has been instituted.* Mothata, 2000, p.18.

Prior to 1994, the RETF had well-established units dealing with policy development at a provincial level, particularly around Adult Basic Education and Early Childhood Development. Whilst there was considerable anticipation in terms of service delivery within a new democratic framework, there was of course little, if any, experience within the RETF members of policy implementation on a regional basis. As Ms Hoosain's period in office was short-lived, the disjuncture between government policy formulation and the implementation of it only became evident for the first time during Mrs Balindlela's administration. In 1995 doubts began to surface about the relevance of government policy and the readiness of the country to implement either in the short or medium term because of the lack of resources and the lack of capacity at all levels of delivery. Readiness to implement also assumes the existence of information systems which are both accurate and readily accessible to local managers, established through a rigorous auditing process. These systems did not exist. As the years went by a discomfort began to emerge around the notion of the department's officials being victims of policy overload.

> *The department was the recipient of a set of policy directives issued forth from the national ministry in no particular order, with no phasing, with no attention being paid to the co-ordination that's required to be done at a local level. My view was that the policy overload was of course leading to significant implementation deficits. I mean there was sort of an incapacity almost to implement anything, because we were still looking at the one policy when the next one landed, so nothing's done about it – it's dropped – and we try to respond to the next issue, and so on.*
> Interview with Interviewee No.4, March 2000

Although Mrs Balindlela was visible and had a presence across the province, it was evident that government policy was not being implemented and enforced. Children did not attend school on a daily basis and there was no system of School Attendance Registers for monitoring attendance. Although more than half of the Education Development Officers (EDOs) had never been appointed for budgetary reasons, EDOs did not inspect schools. Policies began to appear to be irrelevant as the link between policy formation and implementation had not been made, and because of the contestation which began to emerge around centre-province relations. The departmental policy task team was charged with preparing the Eastern Cape Schools Bill. Ironically, it did so, well in advance of the national document, and the department was ready to promulgate it in 1996. The National Government intervened, requesting a delay until the national act (the South African Schools Act, 1996) was placed on the statute book. The Eastern Cape Schools Act was finally promulgated in 1998. The Departments of Education in the Western Cape, where the Nationalist Party had political control and where there was already a mood of defiance towards the national government, and Kwa-

Zulu Natal ignored this intervention and produced their own schools act in advance of the government's .

The South African Schools Act, 1996 placed an imperative on the provincial department to put in place governance structures in schools. In the Eastern Cape, training modules for school governing bodies were devised and translated into various languages, and trainers were trained to deliver the modules. The legislation had created a facility for the community to be able to interact with their local schools through their governing bodies. In rural schools and poor schools, however, the reality was that parents were not able to participate because they were illiterate.

The department also responded to the requirements of the National Education Policy Act, 1996 by developing norms and standards for the funding of the province's schools so that more resources were allocated according to its resource targeting table to the poorer schools. The actual implementation of that policy did not take place in the Eastern Cape until 2000, and then only incrementally because of the province's financial instability. In terms of redress, individual policy initiatives were only partially implemented because of the budget crisis and because the machinery to implement them was extremely weak. Of the 6 regional offices and 41 district offices, all were dysfunctional except for one or two regional offices and ten district offices.

> *In this department we have a situation where people never want to take decisions and responsibility for their own actions, possibly because they do not know how or because they never believed they would be supported or because their only experience is that of a teacher in the classroom.* Interview with Interviewee No. 5, February 2000

> *The problem is that a close analysis of the Public Service today in the Eastern Cape will reveal that the bulk of it are the Civil Servants from the former Ciskei and Transkei Departments of Education. Add to that the capacity of schools and teachers to deliver change and it is evident that the policies designed by the government do not relate to existing capacity on the ground. So there is either resistance or a disjuncture between the policy statement and what actually happens on the ground. During this period in the Eastern Cape, the provincial government, with some degree of justification, was frustrated with education officials across the department as they had caused many difficulties around their lack of productivity. There was an added sense of frustration which revolved around the insufficiency of the departments budgets, the lack of effective senior political leadership and because the department appeared to be on the on the road to nowhere.* Interview with Interviewee No.2, February 2000

Service delivery did not improve during Shepherd Mayatula's period in office. There continued to be resistance and disjuncture between policy statements and what was happening on the ground. The department did not have the capacity to implement them so that there has been little positive impact on the lives of children in the province.

> *If you look at the documentation from the Department of Education it sounds very good. The ideas are pure and they actually give people hope but the problem is when it comes to implementation things don't happen at all. If the MEC could get a corps of people around who are really serious about making change, maybe things would work out. I'm not sure whether the people around the MEC understand what is happening. Many of the people in there are still protecting their positions and are very threatened by other people. I think there are good intentions in terms of redress but there are people within the department who are actually stalling progress. If the department could actually identify those witnesses and actually put some remedial activities in place, I think things will go right.* Interview with Interviewee No.20, March 2000

De Clercq (1997) questions whether education policy-makers in South Africa have sufficiently addressed the realities of economic life alongside

historical commitments. It is her view that there is a need for policy makers to give greater centrality to issues of implementation.

> *South African policy work will...benefit significantly if it roots itself more firmly in local realities, dynamics and constraints on the ground, and if it promotes a dialogue and debate among the social actors involved at all the different levels of policy-making.* De Clercq, 1997, p.166.

The contestation in the Eastern Cape is summarised in the following way:

> *The approach ... was a top-down approach, it was a non-consultative approach – other than in sort of a formalistic kind of a way. It was certainly not a bottoms-up approach, and certainly not grounded sufficiently in the realities in the context of implementation, which for me is the budgetary framework; the human resource pools; the management capacity that exists, and the specific conditions in schools and backlogs...But the approach was one which was almost impervious to any of those considerations. For me, there was a false distinction, or a false cleavage actually, in the policy implementation - development implementation continuum. Even though the constitution assigns policy formulating capacity or authority to national government and expects provinces to implement, and there's a kind of mechanism by which it happens – I think if one thinks in a disjointed way where your task ends once you've passed the legislation, or you've issued the policy document, then I think you're in very real trouble. I think it's been demonstrated over and over again, that many of the policy stances we've adopted, have simply not been implemented. If they have, they've mutated significantly in implementation. They have been implemented in part only, or they've been implemented in ways which fundamentally undermine the original policy intention – sometimes not even intentionally. Because people just don't understand or haven't been brought around significantly.* Interview with Interviewee No. 4, March 2000

Nelly Stromquist (1998) argues that policy makers should bring in people from different levels of the community, and that policy development should essentially be a search for a product of the common good, which should seek to legitimise the way money is spent. She defines policy formulation as the

consequence of negotiations and struggles between different positions. The state's role is to act as a mediator of conflict during the policy formulation process, to create the policy agenda and to shape the policy outcomes. Although policies are generally seen as strategies for solving problems and as instruments of social control, Stromquist believes that policies tend to be merely symbolic. i.e. an intention to do something without the serious commitment to implement it, and a statement of intent which frequently fails to focus on the implementability of the policy as well as the issues relating to the implementation of it, e.g. where is the funding to come from to enable the policy to be implemented, and who will be responsible for implementing the policy?

OUTCOMES BASED EDUCATION

One policy which appears to fall easily into the critique above (see p. 123) was the government's policy on Outcomes Based Education (OBE). Harber (1998) states that curriculum reform in South Africa was initially concerned with the removal of offensive material and gross apartheid biases and distortions from existing textbooks and syllabuses. However, the curriculum framework document produced by the government at the end of 1995 consistently used the term 'outcomes based education' to signal the government's intention to move away from a prescriptive, rigid and centralised curriculum to a more flexible, learner-centred, decentralised and negotiated curriculum aimed at helping to foster a democratic society. In his critical assessment of government policy, Jansen (1997) contends that the South African government's policy research and policy planning department created new crises in the country's education system. Although he

accepts that it is incontestable that the apartheid curriculum required radical reconstruction, Jansen believes the government's OBE policy is ill-conceived and unworkable, and that it has impacted negatively on South African Schools.

> *...this policy is being implemented in isolation and ignorance of almost 50 years of accumulated experience with respect to curriculum change in both first world and developing countries. Rather than spawning innovation, OBE will in fact undermine the already fragile learning environment in schools and classrooms of South Africa.* Jansen, 1997, p. 2.

Jansen's reasons range from the complexity and, at times contradictory, nature of the language of OBE, the unproven link between OBE and economic growth, the flawed assumptions about what happens inside schools, the strong instrumentalist view of knowledge which underpins OBE, the concentration on outcomes rather than process, the side-stepping of values education, the increased administrative burdens placed on teachers, the trivialisation of context, and the lack of complementary innovations, e.g. training programmes for teachers and the need for a radical revision of the system of assessment.

> *The three main reasons for projecting failure were my concerns about the hopelessly overstated policy claims of OBE (such as contributing to economic growth or dramatically changing social relations in the classrooms), the inaccessibility of the policy in part because of a burdensome and complex new curriculum vocabulary, and an official miscalculation of the scale of under-preparedness in the environment into which this sophisticated policy would be introduced.*
>
> *I learned that there remains a huge gulf separating policymakers and their planners on the one hand, and teachers and their classrooms on the other. As under apartheid's Department of National Education (DNE), curriculum policy in South Africa remains context-blind. I simply cannot understand (outside of political explanations) why such a simple matter as making context central to policy deliberation is so hard to concede when both policy and politics gain from such recognition.* Jansen, 1997

Harber is clear that since 1995 there have been problems in implementing the new curriculum policy. He states that the first issue was that the process of curriculum reform was unduly rushed. The curriculum framework document appeared at the end of 1995 with an implementation deadline of January 1999. This meant that a major process of curriculum reform has been allocated considerably less than two years' preparation and discussion prior to implementation. There was also an increasing criticism that teachers were being left out of the process of curriculum reform, which was being bureaucratically driven to meet the January 1999 deadline. Teachers had no ownership of the process which they saw being driven by experts. Consultants and experts were brought in from overseas, some of whom having no grasp of the South African context.

> *Much of their work had to be decoded to make it accessible to teachers. The system will only change once teachers at the level of the classroom can access the language that is flying around amongst bureaucrats and academics. The [provincial] department has been running a whole number of workshops since they introduced their programs to build the capacity of teachers and officials but I think those who are facilitating them are struggling with just understanding the technicalities of OBE with its 66 facility outcomes, statements, indicators. Much of it is very vague, causing teachers to be confused. OBE came from overseas and from professors from the former white universities who themselves had never been to a black classroom and who had never taught in black schools. OBE is an example of a colonial approach laid on an environment which is intellectually challenging and where the bureaucrats want results.* Interview with Interviewee No.21, February 2000

While many educationalists lauded parts of the OBE approach, they also questioned whether it was appropriate for the predominantly

African teaching force of the country to be required to teach a type of education with terminology which was way beyond the understanding of the average teacher.

> *We were told by the international guru of OBE, an American called Spadie, to take our existing subjects and transform them with 5 or 6 critical outcomes to teach kids to be critical thinkers and to learn to think systematically. We also got advice from Scotland, Australia as well as Canada... the very first team that laid the foundations of it were a Canadian team. For the OBE system to work you need a grasp of the fundamental concepts at quite a deep level, of science say. Our teachers don't have the cultural capital to be able to transform subjects, and they don't have the subject knowledge in the first place. So to me there is an urgent need to come up with the technology of putting into teachers' heads fundamental concepts, not imposed, but growing out of their rich knowledge of life.* Interview with Interviewee No. 5, February 2000

In the Eastern Cape, school principals reported that teachers were demotivated and confused by the jargon. The former Model C schools coped, but the schools in the rural areas did not, and misinterpreted it.

> *We came through the old system and should have re-established the culture of learning and teaching within our disadvantaged groups before moving over to another system.... It [OBE] has paralysed officials, and it has paralysed and frightened teachers.* Interview with Interviewee No.22, February 2000

Although training was being provided it relied on a system which was intended to cascade through the various levels of the teaching force. Schools principals found it difficult to filter the complex messages to the staff of their schools, and to teach OBE to large class groups.

> *The cascading system has not worked as there has not been enough time both within the school day and in twilight sessions to provide the necessary training for teachers to implement this program.* Interview with Interviewee No. 6, February 2000

It was also evident that there was little, if any, follow up after the training sessions had taken place. As officials were unable to get to schools, there was no support. Teachers in the remote areas, particularly within the Transkei, received no training in contrast to teachers in the townships and the advantaged areas. It was also recognised that the successful implementation of OBE required a large amount of extra learner support materials. The financial situation of the department meant that it simply was not possible for it to provide these resources from within its budgets. Schools therefore used whatever materials they could muster to augment the small number of OBE materials they received.

> *The constraint was around resources although the actual training of the educators has gone on very well because there was earmarked funding for that. The challenge arose when the time came to put some resources into schools, that's where we had serious problems. We didn't have adequate funds to provide the learner support materials. So teachers had to improvise.... But it is a national policy, and there's always a tension arising out of that. So one always has the perception that you have failed, even though there has been significant training, and although there has been significant attempts to try and get learner support material.* Interview with Interviewee No. 9, February 2000

> *It is like driving a car whilst designing it and not knowing when it will crash. We are much more obsessed about change for its own sake without really preparing for that change. Typical of that is the execution of OBE. People stand on platforms saying that the department is implementing it but we are not, as teachers have not been trained effectively to understand OBE. The department has embarked on a program of training for school principals and governing bodies. In most of our schools, there are very few people who can actually speak English. However, all the training materials are only available in English and Afrikaans.* Interview with Interviewee No.23, March 2000

CONCLUSION

In my view there is a fundamental need to have an organic linkage through the policy development and policy implementation process. A failure to achieve such a linkage will inevitably result in policy development becoming nothing more than a cerebral exercise. In South Africa there is considerable evidence to suggest that policy makers are thinking only in that way. As a result resistance and disjuncture exist between the country's policy statements and what actually happens on the ground.

In my view this is particularly evident in relation to the government's determined push to instil OBE in its schools, which was clearly attractive on equity grounds in that it made explicit a new curriculum approach for all its schools to coincide with the birth of a new nationstate, and at the same time signalled the demise of traditional transmission and content laden approaches to teaching and learning. The requirement for educators to adopt this approach which was jargon rich and which obliged educators to think abstractly and to deal with complex skills was open, in my view, to contestation on several grounds, chief of which was:

- the belief that a new curriculum approach was required to raise standards,
- that an approach which had been successfully implemented in the first world was capable of being transferred and implanted into a third world context,
- the significant resourcing issues around the provision of materials and training,

- the readiness of the vast majority of the country's schools to deliver this approach following a decade of conflict in which the whole fabric of teaching and learning within local communities had suffered. In many communities schooling had effectively ceased during the years of the struggle. In the mid-1990s most township schools were attempting to restore the culture of teaching and learning into its daily activities. In the rural areas of the Eastern Cape and elsewhere the schools were located in difficult environments with limited resources, poor educators and poor teaching.

In my view the introduction of OBE into the country's schools was ambitious and unrealistic. As an approach it was conceptually flawed, contextually foreign, and driven by policy makers who were less concerned with understanding the realities on the ground than global trends.

In the Eastern Cape the provincial administration was the recipient of a set of policy directives issued from the national ministry, of which OBE was one, with seemingly little attention being given by the government to the planning, co-ordination, staffing and resourcing issues that were required at a local level.

> *This has resulted in policy overload which in turn has led to an incapacity to implement anything, because departmental officials were still looking at the one policy when the next one landed, so nothing's done about it – it's dropped – and we try to respond to the next issue, and so on.* Interview with Interviewee No.4, March 2000

Chapter 5 concludes, to a large degree, the descriptive analysis and commentary of this thesis. In it, and within the two chapters which preceded it, the historical events leading up to the first department of education in the Eastern

Cape, and the work of the Hoosain, Balindlela and Mayatula administrations which followed between 1994 and 1999, have been set out. Chapter 6 will seek to extend and widen the discourse by introducing a democracy perspective, in which the provincial department's attempts to achieve redress, equity, improved access and participation are explored.

CHAPTER 6

EDUCATION FOR DEMOCRACY IN POST-APARTHEID SOUTH AFRICA

> *A democratic education has implications for both school management and the curriculum...Legislation in South Africa... has made [elected school] councils mandatory in all secondary schools. In terms of curriculum it means some choice for students of what they learn... greater variety in teaching method with students being actively engaged in learning on a regular basis... Also a more diverse range of assessment techniques will be used...* Harber, 1999, p.65

INTRODUCTION

Following the elections in 1994 South Africa committed itself to education for democracy to create in its schools and society at large a culture based on human rights and mutual respect to shield the country against a return to the racial inequality, prejudice and hostility associated with the apartheid era. The aim will be to create democratic citizens through mutual respect, non-authoritarian teaching techniques, and a curriculum which has numerous opportunities for the exploration of social and political issues. Education for democracy will require the country's teachers to think and behave differently in the classroom. They will need to encourage rather than suppress critical and creative thinking, and promote questioning attitudes. Teaching methods will need to be active, and participative rather than passive and one way. Assessment techniques will involve students and teachers taking shared responsibility for learning outcomes and students learning.

Following the political changes in 1994 it was evident that the legacy of defying authority had created enormous challenges for the new government. The nature and scale of these challenges suggested that the country was unprepared for its new liberal environment. The general climate within the country as a whole

was one of disrespect for structure and for authority, and this impacted on the country's schools. This legacy manifested itself in the form of ungovernable schools, poor student discipline, high levels of unauthorised pupil absenteeism, defiance of teachers, teacher absenteeism, and a black teaching force which lacked basic pedagogical skills and the ability to motivate children to learn.

> *It is the aftermath of the liberation struggle. The children are not at all motivated to learn these days. They see no future. There are other things like the ungovernability of schools and it has had a residual effect. I think it is still there in the minds of the children, that they can defy teachers. Teachers themselves don't go to school for two, three days and still collect their cheque at the end of a month. All those things have resulted in democracy being abused and it has had an effect on the attitudes of both children and school teachers.* Interview with Interviewee No. 24, March 2000.

It was also evident that the ANC had failed to galvanise its activists to support the process of normalisation. It is clear now that they could have done much to influence positively the return by learners and educators to normal schooling, particularly in seeking to change the attitude of local communities to schooling.

> *Teachers were being deliberately subversive in some cases for their own personal interest, in which case they thought it was in their interests to continue calling themselves revolutionaries... In South Africa we were not ready for the liberation thing, it is like we were caught unawares... It is as though we are still fighting. And we spent five years fighting even though we had been freed.* Interview with Interviewee No. 25, March 2000.

From the official promulgation of apartheid in 1948, schools were institutions and instruments of an oppressive regime. It is therefore not surprising that some communities found it difficult in 1994 to adapt to the political changes and to support the work of the principal and his/her staff. Communities, and in

particular those where there had been a history of defiance and activism, became more alienated as the resources and improvements which they were expecting to see as part of the liberation process failed to materialise. In these communities, two-way partnerships made an uncertain start in the new democratic era.

> *In South Africa, schools are still seen by the majority of black people as the white institutions. They see those schools as impositions on them by a white government and it is critical to the transformation that communities take ownership of their schools and see the value of the schools. I found a very strong parallel in a very rundown housing estate in the north east of England where there was an instinctive and immediate hatred and dislike of the social worker, the priest, the teacher, of any authority symbol. Just multiply that approximately a thousand times and you get somewhere near to the kind of hatred that exists of the colonial institutions. In 1953, the mission schools were the main providers in rural areas for blacks. These were wiped out by the Bantu Education Act which literally provided an education designed to turn people into low grade servants. Now with that kind of imposition, how do you then get the respect back of communities for schools, given you haven't any resources.* Interview with Interviewee No.5, February 2000

It is generally accepted that shaping a democratic civil culture to overcome this legacy can only be achieved by channelling resources into education and by changing the nature and process of education. Harber (1997) argues that formal schooling is a key social institution in securing democracy and that the democratic skills, values and behaviours necessary to sustain democratic political institutions have to be learned, as they are not genetic. Schooling, he argues is a political process and as such cannot be neutral on the issues of democratisation - either it facilitates the development of democracy or it obstructs it. In the context of the 'New South Africa' Harber asserts that

> *the government.. is committed not only to racial equality in education but also to democratic forms of school management and curriculum, which will be essential in creating a culture in schools and the wider community based on human rights and mutual respect.* Harber (1997) p. 139.

Although legislation in South Africa has made elected school councils mandatory in all secondary schools, a democratic education has implications for classroom teaching and the curriculum as well as school management. The democratic classroom indicates greater variety in teaching methods, with students being actually engaged in learning on a regular basis. A more diverse range of assessment techniques may also be used in addition to examinations based on memorisation.

> *In South Africa this will require... 'a radical paradigm shift' as schooling has been traditionally characterised not only by racism but also by authoritarianism designed to encourage conformity and suppress a critical and questioning attitude in order to control a population confronted by patently unfair and unequal social structures. Ibid*

REDRESS AND EQUITY

Harber (1998) suggests that educational reform policy in the new South Africa needs to change the aims of education, and reform the nature and processes of learning in schools and classrooms in order to achieve these aims. The White Paper on Education and Training, 1995, reflected the change in emphasis of the ANC away from the language and rhetoric of socialism to a language which stressed democracy, pluralism and human rights. This is an important document that sets out the ideological framework for educational reform in South Africa. Redress of past discrimination and structural inequality is therefore a key element in educational reform in South Africa.

The government has also been concerned with process as well as redress. In conjunction with a policy of more equal provision exists a policy to make schools more democratic and less authoritarian institutions. The government's White Paper, 1996, on the Organisation and Funding of Schools aimed at fostering democratic institutional management through a school governance structure to include parents and teachers as well as representatives of an elected student council. However, while some schools have introduced more democratic and participatory structures in which pupils are involved in decision making, these tend to be the exception rather than the rule.

In order to break with the apartheid past, and provide redress of racial inequality in educational provision, Jansen (1998) argues that the government legislated for the generation of greater equality of performance within the education system through its Curriculum 2005 policy and its Outcomes Based Education approach. The government argued that OBE would benefit disadvantaged learners by making explicit, in advance, what outcomes were required and would allow learners to proceed at their own pace through intensive, individual teaching support and formative, continuous assessment programmes. Jansen states that scholars have warned for some time that the mode of policy implementation followed for C2005 would in fact increase the resource and performance gap between white and black schools (Greenstein, 1997). He refers to the fact that the pilot evaluations of Grade 1 classrooms in several provinces in fact showed differential impact of the policy on under-resourced compared to privileged schools (e.g., the Mpmumalanga Evaluation of the Pilot Programme).

In addition, a thirty-nine Grade 1 classroom study, conducted through the Centre for Education Research, Evaluation and Policy (CEREP) nine days after the implementation of C2005 showed the following: [1] that most black schools had not started implementation of C2005, [2] that white schools believe they have been doing C2005 anyway, and therefore did not need to make any dramatic changes to their curriculum, and [3] that while white teachers had accumulated resource support materials well beyond the informational sessions provided by the government's provincial Department of Education, black teachers had very little support materials. (Jansen, 1998) But the problem of growing inequalities would emerge even if all schools received the same curriculum opportunities. I [Jansen] call this the 'Sesame Street effect': even though this programme was intended to provide curricular opportunities for poor and minority children, the fact that all children had access to these programmes through television, meant that those already privileged would gain even more than their under-privileged counterparts. In the South African context, even if one were to assume that inequalities would be addressed by providing all schools (privileged and marginalised) with the same curriculum opportunities to support C2005, white schools would benefit more, given qualified teachers with a starting base of greater confidence, material resources, parental support, private sector relationships, and whose children have library facilities, degreed parents and the internet at home etc. The problem is that not only did black schools have less training exposure and material advantages than their white counterparts, they also were hit hardest by the lack of provincial budgets to support the supplies of basic materials and ongoing support since the introduction of the new curriculum. In short, a range of factors combine to further marginalise under-resourced schools (which are largely black) while advantaging the already privileged schools (which are largely white).' 1998, p. 4.

In the Eastern Cape where the problems of inequity are massive it is now understood that these inequalities will remain for a very long time to come, and that there is not going to be an instant solution in terms of addressing the inertia of significant inequalities of the past. It would be true to say that this understanding is one which has become accepted over the lifetime of the first parliament rather than being known in 1994.

> *The apartheid system left us with major imbalances. Some of us were not really well-informed about the amount of work that would need to be done to reverse the situation. I think today we are more realistic, and know that it's going to take us another 10 or even 15 years to really bring fundamental changes.* Interview with Interviewee No.12, February 2000

However, in terms of redress, it is still not properly understood that the policy of right-sizing the education service, (i.e. equalising staff:student ratios) will be difficult to implement, not least because it needs to be approached from an informed technical vision with effective management information systems, but that the pockets of privilege, the former white schools are very small.

> *They are tiny islands within a sea of massive under-development in the province. We are talking about 260 schools out of 6400. So in theory you can take their resources and spread it across the rest and you will not make a millimetre's difference to the levels of resourcing in all the other institutions...Because even if you push the top down, you are not going to get anywhere, because the top is so tiny.* Interview with Interviewee No.4, March 2000

The department has estimated that it has a shortfall of 20,000 classrooms. In 1996 the province received funding from the Reconstruction and Development Programme (RDP) of R320 million to provide a thousand emergency classes to assist with the province's classroom overcrowding problems. Over a three year period, 287 schools were included in this programme which provided a thousand additional classrooms.

Since 1996 the department has had to rely on overseas donations to fund the building of its new schools. Partnerships with donor countries have led to the Japanese building schools in the remote areas in the Northern Region around the

town of Umtata. These are the Ikhwezi Lokusa and Isithole school projects. The European Union is also funding the building of schools in two regions.

The department's capital budget for 1998/99 was R54 million, of which R27 million was utilised to replace classrooms which had been destroyed or damaged by tornadoes. Although 265 schools have been renovated since 1994, the department has been unable to make any impact on the 20,000 classroom backlog. In 1999/00 there was no budget for major capital works. R5 million was found for minor repairs and maintenance. Some funding was also made available for the department's non-grid electricity programme which aims to supply electricity via solar panels to rural areas.

In 1997, the department also initiated a pilot scheme for a community building programme in the Egkei area involving a further 287 schools. Building committees involving representatives of the community have been established to oversee building work in these schools. Negotiations have taken place with these communities for the communities to build the additional classrooms. Following agreements with the communities in 1997, the department deposited a sum of money into local banks sufficient to build three classrooms at each school. Bank accounts have been opened for each project. Guidance manuals have been left with the schools and NGOs have been engaged by the department to support the communities. The department expected this programme to deliver an additional 860 classrooms over a period of 6 months during that year. The communities have responded by using local materials wherever possible. They have collected sand from the local rivers, manufactured the bricks themselves instead of purchasing

them, and in some cases, have managed to build 5 classrooms, with an office and store room instead of the 3 planned classrooms. The success of this pilot project will mean that it will be replicated elsewhere in the Province.

Although there has been an accelerated program of building schools, and attempts are being made by the department to redress the inequalities of the past, the lack of resources will ensure that the classroom backlogs will continue for many years. In the Eastern Cape there has been little redress due to the huge backlogs, the severe lack of resources, and the mismanagement of funds and because of the absence of proper information systems. The province has participation rates in some year groups of 160%, and massive under-age and over-age enrolment in the school system because of the poor quality of the teaching process and length of time it takes for students to work through the system. The only exceptions to this somewhat bleak picture of under-development is the supply of electrical power to some schools, and in a few pockets of the province, the provision of extra classrooms, telephones, the limited supply of learner support material and the teacher development support received from NGOs and overseas-funded projects like Imbewu. Expectations that people had in the Eastern Cape that the national government might give the province special financial treatment have also come to nothing.

> *There has been no redress at all. What you see now, here, at my school is what was here before 1994. Nothing has been added. There have been no improvements in terms of learning opportunities for children. The only opportunity we have had has been the opportunity for our children to be exposed maybe once a year, to the computers, and swimming pool at Hartzen Park school.* Interview with Interviewee No. 6, February 2000

In terms of redress, equity, and development, there has not been much that has been done and that is what we as a union have been stressing. We find that the departmental official in the regional office who is supposed to be carrying out a particular task is not doing that. Take an example of one region, S-Eastern Butterworth. Computers sponsored by ESKOM or TELKOM, were supposed to be going to schools in the rural areas. Even though there has been improvement in terms of electricity to some schools, we have a situation where the region[al office] is not distributing those computers to the schools. That's why our argument is that there are certain people employed by the Department, who don't belong there, and who have very little interest in our communities in terms of development. Interview with Interviewee No. 15, April 2000

We are dealing with people who were marginalised, people who couldn't work, people who couldn't go to school because they had to find work to survive. People were forced out of the school system because there were no schools in their areas. People who never went to school because they had to herd animals. No there hasn't been much in the way of redress, not in terms of education. Interview with Interviewee No.8, March 2000

There were however two policy initiatives which were aimed at educational redress: teacher redeployment and norms and standards. The department hoped that these two instruments (redeployment and budget redistribution) would be effective in addressing the equity question on a large scale.

Redeployment of Teachers

At the end of 1997, the National Department of Education introduced a teacher redeployment and rationalisation scheme which sought to place teachers in schools where there was a greater need. In the event that the teacher refused to be redeployed (and they could so in the Eastern Cape up to a maximum of three posts) they would be declared redundant and offered a voluntary severance package. The post would then be transferred to a school with a greater need. In the

Eastern Cape, a moratorium was already in place on the appointment of any new teachers to vacancies in public schools. Vacant posts had therefore to be filled from within the existing cohort of teachers who were additional to a school's establishment figure. In 1999, the number of supernumeraries was 51,301. The outcome was that between 6000 and 7000 thousand teachers from the black schools in urban areas in the Eastern Cape were redeployed to schools in the rural areas. Although some schools in the Transkei were staffed entirely by supernumeraries, the majority of the vacant posts in the Transkei remained unfilled, as teachers refused to live and work in schools in that part of the Province. In 1999, there were about 5,500 teaching vacancies. Almost 5000 of these posts were in the Transkei, of which 2060 posts had not had a single applicant.

> *I need to say that we are still finding great difficulty filling some of the positions in the remotest of the remote areas, because no educator wants to go there because of the poor infrastructure and lack of transport.* Interview with Interviewee No.1, March 2000

The directive issued in 1997 also exposed the absence of any initiatives by the department to retrain educators to enable them to take up new posts, teaching subjects for which they are untrained. It also had a major impact on the employment opportunities available to college leavers. From 1998 no students graduating from any of the province's teacher training colleges were able to find a job – unless they were successful in securing a post funded by the governing body of a school. As a result the numbers of school leavers wanting to train as teachers has reduced dramatically and this in turn has led to the closure of a number of the province's colleges of education. It also led to graduating students being directed to the

Transkei to be used to provide in-service training to the many under-qualified and unqualified teachers in that region of the province. Furthermore, a large proportion of the teaching force is inappropriately qualified when compared to the skill shortage. For instance, the province has a large number of teachers of Bible Studies and Xhosa, and a much smaller number of maths, science and technology teachers. The implication of all of this is that the province is likely to face a crisis of large proportions in terms of finding quality teachers in the technological subjects, natural sciences and economic sciences, until it relaxes its recruitment policy, and until the national government develops a teacher retraining/upgrading programme to cater for what is a national problem: namely, that '36% of teachers teaching mathematics, 53% of teachers teaching general science and 27% of teachers teaching physical science are un/under qualified.' (Edusource Data News, 1996, p. 20.)

According to Jansen, 1998, there are many reasons for the failure of this policy nationally,

> *including the fact that a fiscal crisis within the state (that is, there were simply too many teachers in the system given available state resources) was disguised as a commitment to shifting personnel resources to the most marginalised schools. First, more teachers than expected took the VSP thereby plunging the state into even greater fiscal duress than anticipated. Second, despite the teachers who took the VSPs, several were re-employed and new ones employed [not in the Eastern Cape] so that the aggregate numbers of teachers remaining in the system were still too high -- with the result that a multi-billion rand bailout in 1997/1998 was required from the Ministry of Finance given gradual but systematic overspending on personnel costs in most of the nine provinces. Third, this depletion of provincial budgets then meant that there was simply not enough funding available for basic material resources to the schools (such as stationery), teacher development and other support services. If the policy goal, therefore, was simply to raise the quality of black schooling through the redistribution of resources within the schooling sector as a whole, this did not happen.* p. 3.

Norms and Standards for School Funding

A new funding system for schools which is also intended to have a huge impact in terms of redress is the new legislation on Norms and Standards for School Funding. This piece of legislation requires all schools to be ranked according firstly to the wealth of the school community, the income schools are likely to receive from it, and the ability of parents to pay, and secondly on the basis of the general condition and physical infrastructure of the school. The 20% most advantaged schools in the province will receive 5 percent of the general schools budget, whilst the 20% poorest schools will receive between 40% and 60% of the overall budget. The intention therefore is for the poorest schools to receive a massive allocation of resources, in direct contrast to the minimal allocations they received during the apartheid era.

There have, however, been implementation problems around this new legislation. In the Eastern Cape, the average black school is isolated and small, serving pockets of people in the rural areas. The larger schools are mostly in the urban areas and more affluent communities. In the Eastern Cape there are 750 schools with enrolments of 50 learners and below. Schools in this category will receive between R176 and R200 per learner. With 50 learners, a school will receive a maximum of R10 000 for the year, which the department will expect the school to use to pay all utilities, to purchase books and resource materials and to carry out basic maintenance. However, R10 000 would just be sufficient to pay the school's annual telephone bill. The larger schools will receive R50 per learner,

but because there may be as many as 1,000 learners at the school, it will receive R50,000. The policy therefore appears to favour large schools as larger schools can do far more with their money. Moreover, the majority of black families seek places for their children in schools located in one of the affluent areas. The department is therefore forced to continue putting money into the former white schools, and in so doing undermine one of its own principles of redress by diverting resources away from the townships or rural areas. The new funding arrangements also require school governing bodies to have their own budgets. Section 21 schools, as they are called, will have full responsibility for their non-personnel budgets, but within strict rules in terms of how they should carry out those responsibilities, and with a very strict monitoring and reporting back system.

The key for a more equitable distribution of resources is beginning to come into place now with the implementation of the norms and standards for schools financing. The intention is very rapidly to allocate the non-personnel budget on an affirmative action basis. But we have had to slow down the implementation on that, simply because we do not have the data we need. We have to spend more time building this up. The plan is to very rapidly advance that process next year. That would mean significant financial resources going into institutions which currently do not have anything. Part of the reason why I am not too concerned with the delay, is that it does give us time to put in place a framework for the responsible application of those additional resources. I mean you can dump R100,000 on a school, and it would all go to waste if it is not clear what the parameters are. We need to be clear about what the best things are to invest the money in. Do we need to employ another teacher? Do we buy books and equipment? We need to do quite a bit of work around those kinds of questions before we proceed too rapidly with that process. Interview with Interviewee No.4, March 2000

The budget will be allocated to enable schools to carry out maintenance of their buildings, to purchase text books, and to pay for public utilities.

> *We have selected a number of schools which already have the capacity to manage their own budgets. They are all the ex-model C schools. We are going to transfer their budgets to those schools. To ensure that we don't revert to the old mode of over-expenditure, we are saying this year we are going to monitor them very closely, develop their capacity, develop the capacity of the governing bodies and then next year, once we are able to identify what the pitfalls are, we are going to increase the implementation.* Interview with Interviewee No.9, February 2000

The department has also decided to extend the category of Section 21 schools to include a small number of non-ex-Model C schools, (the ex-Model C schools were semi-privatised state schools in the former white only areas) to pilot the implementation of the devolved funding to schools where there has been little or no previous experience of working with large budgets.

> *We have selected a number of schools who will receive budgets. They are black schools which have never operated budgets. Now for the first time we are saying, here is your budget, see what you do with it, and use those funds within this particular framework. It is then for us to ensure that we don't revert to the old mode of over expenditure. We are saying this year that we are going to monitor them very closely, and develop the capacity of the governing bodies and then next year, once we have been able to identify what are the pitfalls are, we are going to increase the level of implementation.* Interview with Interviewee No. 9, February 2000

Post-provisioning was an earlier attempt at redirecting resources to bring about a more equitable distribution of educators in schools. It made use of a weighting system which considered the number of learners, the age of the learners, and the stage learners were at in the school system relative to their age. The younger the child, the higher the weighting. However, Grades 4 to Grade 7 did not receive a weighting. Students entering the examination Grades 8 and 9

would also be weighted. The weighting system also took into account the type of school. Combined schools catering for pupils between Grade 1 and Grade 12 received a higher weighting. If the school had parallel medium, or dual medium of instruction, they would receive a higher weighting. Similarly the broader the curriculum, the higher the weighting. Specialist subjects would have a higher weighting than others. Music would therefore have a high weighting, because more educators would be needed to teach music. This weighting schedule had the effect of putting more money into the ex-Model C schools. The schools in the townships received the lowest weighting, and the least benefit under the post-provisioning arrangements. It was a national issue.

The issue became even more contentious when it emerged that the additional weighting was also applied to the additional educator posts in schools funded by governing bodies. It became evident that the department had failed to examine the curriculum in the ex-Model C schools and therefore failed to identify the governing body-funded posts. As a result, budget allocations were higher to these schools than they should have been. The result was a further widening of the gap between the poorer and more advantaged schools.

> *The ex-Model C schools had large pupil rolls and additional teaching posts paid for by the parents. These posts were mistakenly included, as were the additional pupils admitted to the school as a result of these school-financed posts in the budgets allocated by the department to those schools. It was a terrible mistake. We should have looked at the approved curriculum for which the State would provide educators. So the schools which were already privileged got even more privileges because those school-funded educators became part of the State-funded posts.* Interview with Interviewee No.29, March 2000

Attempts at redirecting resources, e.g. school funding norms and post-provisioning, have failed to bring redress.

Decentralisation

Pre-1990 control and decision making was vested entirely in the hands of the state and the school principal. In those areas of the country where teaching was taking place, management councils supported, to varying degrees the work of the schools. In 1992, the powers of these management councils were extended with the establishment of the Model C schools which enabled the management councils or governing bodies of these schools to levy fees and to determine their own admission policies. In 1996 the government's White Paper entitled 'the Organisation, Governance and Funding of Schools,' and the subsequent legislation, the South African Schools Act 84, 1996 signalled the move towards democratic institutional management for *all* schools through a school governance structure to include parents and teachers as well as representatives of an elected student council. Through this legislation the new democratic government introduced *only* two categories of schools, public and private, and in so doing abolished the Model C schools and extended the right of all schools to control their finances and assets. The legislation also gave governing bodies responsibility for staffing, student discipline, school policies and curriculum matters. The basic aim of the government was to create through this legislation:

> *a new national system for schools which will redress past injustices in education provision, provide an education of progressively high quality for all learners and in so doing lay a strong foundation for the development of all our people's talents and capabilities, advance the democratic transformation of society, combat racism and sexism and all other forms of unfair discrimination and intolerance, contribute to the eradication of poverty and the economic well-being of society, protect and advance our diverse cultures and languages, uphold the rights of all learners, parents and educators, and promote their acceptance of responsibility for the organisation, governance and funding of schools in partnership with the state.* (The South African Schools Act, 1996, p. 2.)

The Act required all public schools to establish their own governing body to include elected representatives of the school, the parent body and the wider community which it served. Within this framework of shared governance with the education authorities, the emphasis is on the active participation of teachers, parents, non-teaching staff and students (in secondary schools only) in the governance and management of their schools. Whilst it is true that an active partnership between different members of the school community has certainly taken place in some schools, and that these schools have become more open, efficient and effective, with a concomitant improvement in the quality of education in the school, it is also true that the parental and community response in large tracts of rural South Africa has been indifferent to this new responsibility through lack of time, concerns about workloads and competencies, and through tensions between the governors and the principal. In these circumstances schools have struggled to move forward and have, in some cases become less effective and efficient under these new arrangements.

The response in Eastern Cape schools was variable and incremental. It became the practice for the education department to run workshops to empower their district managers, and for guidance documents and manuals to be produced for governing bodies. District officers subsequently ran meetings for schools to discuss the South African Schools Act and the requirement for schools to hold elections to governing bodies. District managers also attended workshops about OBE and were then expected to assist governing bodies and school principals in the discussion of these documents with the parent bodies of their schools. Although the extent to which this actually happened across the province was variable, district officers were able to see the benefits of the new democracy.

> *In terms of the principles of democracy, we are now able to express our views, and able to make recommendations. In terms of transparency, we know more about the activities of the department, and communication and information flow is much better. These feelings of unity, ownership and transparency have come together since 1994.* Interview with Interviewee No. 27, February 2000

Elections to school governing bodies did take place but these were intermittent and consequently there was an uneven take-up around the province. In the majority of rural schools there was an absence of fully functional governing bodies. In some areas school committees continued to operate, managed and run by school principals – their primary role being a monitoring one, of non-educational affairs, such as teachers' attendance.

Even though there was a recognition of the importance of black communities being mobilised to actually 'own' their schools, particularly as parents had never been involved in school governance, lack of funding prevented

the running of workshops for parents and for members of local communities. In the rural areas where governing bodies were established, it was the norm for parent representatives to be poorly educated and for their contributions to governing body meetings to be extremely limited.

> *We have a school governing body. They want to support us but our governing body is illiterate, and they haven't got time, as they are working for the farmers. Our meetings have to be on Sundays but even then some cannot come because they are on duty that day. We've got one lady farmer who has been co-opted onto the governing body. She attends regularly but she finds that other members do not attend. The meetings take place at school. We really get no support from the governing body. We get more support from the local fruit farmers.* Interview with Interviewee No. 6, February 2000

Some schools and their governing bodies in the Province did receive support from NGOs and the Imbewu project. As the same schools tended to be the recipients of this support, albeit for different programmes, teachers at those schools complained of being overwhelmed. However, as part of Imbewu's education management development modules, selected school principals and one/two members of their governing bodies were brought together for two day sessions to participate in the training. In these schools there have been noticeable improvements in terms of the culture of teaching and learning, and in terms of ownership and pride felt by governors and staff, who have felt empowered to work collaboratively. Work was also on going into the establishment of a provincial governing body structure.

It is Jansen's view that:

> *measured in terms of net available on-site resources, the distance between black and white schools has increased in the short period since the legal termination of apartheid in the early 1990s. That is, there are now greater inequalities of resources and opportunities between the average black school and the average white school.* 1998, p. 2.

As little has appeared to change for the black communities in South Africa, there is a strongly held view within black minds that the label of the previously disadvantaged can still apply, but needs to be updated to the presently disadvantaged.

> *Parents need proper guidance and understanding to clarify exactly what their roles are on school governing bodies. The situation as it pertains now is that governing bodies are either toy telephones of principals or they are used against the principal. They will be unable to make independent decisions until such time that they have been empowered to execute their duties. The department is actually embarking on a program of training for principals and for governing bodies. It will be important for a common language to be used on training programs for governing bodies, or else the messages will be open to misinterpretation. In most of our schools, there are very few people who can actually speak English. That is the reality of the situation and the discourse is usually only available in English and Afrikaans.* Interview with Interviewee No.23, March 2000

> *As a union we have checked the school governing bodies in our province. In certain areas they are dysfunctional. In other schools there are no school governing bodies. In other areas school governing bodies are used by the principals for their personal interest against certain teachers. If the principal is having some kind of a quarrel with a teacher outside school, the principal will try to use the governing body to chase that teacher away. That is why we have in the Eastern Cape more than four hundred displaced educators, either chased away by the community or by the students.* Interview with Interviewee No.15, April 2000

ACCESS

The White Paper on Education and Training, 1995, was the first official policy document for education. Amongst other things, the policy document included directives emphasising access to education and training for all, equity, redress and transformation. Even though all the ex-model C schools were virtually full, the inequities in the South African situation were such that with the dawning of the democratic era, black families living in the townships attempted to secure places in these schools for their children. It had the effect of producing a new 'lopsidedness' in the education system as the race to secure places in the traditionally white only schools began to take place.

> *When we came in 1994, a lot of the children were on the streets. South Africa was on the boil, so there was an urgent need to halt all of that and to bring order to children's lives. So the first policy framework included arrangements for the registration of children, the provision of opportunities for those who had dropped out, and as a result our schools were overflooded. However, one of the biggest problems was the provision of the necessary infrastructure and equipment, to address issues of access. Some schools were able to determine their own admission policies, so not every school would accept these children, arguing language as the reason why they could not accept an African child into their school.* Interview with Interviewee No. 22, February 2000

The rationale for this attempted migration was clear. At the present time if one looks at the institution of the school, there are two worlds in South Africa. Schools in the informal settlements and the townships, and in the white residential areas, are in completely different worlds. For this reason there is a need to create

and nurture centres of excellence in the midst of the poverty in which many people live:

- to counter the perception and reality of two worlds;
- because the process of transformation has been essentially disruptive;
- so that schools and the communities they serve in the township and rural areas cease to be dependent on the state, and become agents for change and responsible for their own development;
- and because of the price of education.

> *We always talked about free education and free access to education, but the reality is that if you want your kids to have better education, you have to pay. That is already impacting negatively on certain schools. So you have a continuation of a two-tier system basically.* Interview with Interviewee No.2, February 2000

> *My worry is that a two-tiered school system also leads to a two-tiered labour market. Recently I was sitting in a meeting where we were trying to persuade the management at Volkswagen, South Africa, to reduce the numbers of workers who were fired. I went through the list of the 1339 workers. It was quite shocking to find that most of the workers' educational experience did not go beyond Standard 3. There was not a single one with a post-matric qualification. There was only one or two with technical or vocational training provided by the company. The point I'm trying to make is that if you take that as a microcosm of the broader reality, you had a period where many people didn't have access to education, and we have not yet created a sufficient adult education context in which they can recapture that lost opportunity.* Ibid.

SPECIAL EDUCATION

Towards the end of 1996, the government, in line with its commitment in the 1995 White Paper to investigate the area of special needs and support services as part of the transformation of the education system, appointed the National

Commission on Special Needs in Education and Training (NCSNET) and the National Committee for Education Support Services (NCESS) to put in place mechanisms to address areas of concern arising from the pre-apartheid and apartheid eras, which would improve access for black children to specialist provision and support services.

Historical Analysis

Naicker, 1997 states that in the 1700's and early part of the 1800's, no real provision existed for addressing any type of special educational need, due mainly to the negative and superstitious attitudes which existed towards people with disabilities. This led to a welfare and charitable approach to disability, i.e. disabled people must be protected and taken care of, rather than enjoy equal rights. In the second half of the 19th century, schools for learners with disabilities, particularly for the deaf and blind, were opened by specific churches. These schools were divided along racial lines and received no funding from the state.

The state's involvement in specialised education began in 1890 when the Cape Education Department recognised the existence of church-run schools which had been set up for white learners with special needs. Later legislation was passed which made provision for the setting up of vocational and special schools for white learners. This included funding for a few special schools, for the building of hostels in these schools, and the training of teachers. Later funding was also used to set up special classes in mainstream schools for children with learning difficulties. Black learners were supported by the churches and private

institutions. As the apartheid system became institutionalised through the Bantu Education Act of 1953 extreme disparities in the delivery of education became evident. The legacy of apartheid and the massive inequalities in educational provision created for African learners resulted in widespread exclusion and inadequate services, which prevented disabled learners from access to, and equal participation in, the education system.

Reports on special education included:

- The Murray Report 1969. This enquiry into children with minimal brain dysfunction, recommended facilities for specialised services for white children only, and excluded a multitude of learners with disabilities from other races.
- The De Lange Report 1981 included recommendations on children with SEN. It advocated a single unitary education department, and a move away from the strict categorisation and labelling of children with disabilities towards a broader focus on children with SEN, so that individual children are understood in terms of their specific behaviours and needs. It also favoured the placement of children with SEN in mainstream schools.
- The Human Sciences Research Council (HSRC) Report on Education for the Black Disabled, 1987, reflected on the extremely high incidence of disability in the black population group, which the report attributed to factors associated with environmental disadvantage, such as poverty, lack of awareness of and access to medical and health care facilities, exposure to political violence and a lack of opportunities for learning.

Research studies completed since 1987 have indicated that SEN was being generated in South Africa at double the rate of that generated in more developed countries, and the incidence of learners with SEN as a real estimate is between 40% and 50%, as compared to 20% in more developed countries. (HSRC 1987; NEPI 1992; Donald 1993.)

> *During the apartheid years most of the special schools were reserved for white children with learning difficulties. There were very few schools, if any, allocated to black learners with special needs. As a result, schools in the (black) ex-Department of Education and Training (DET) have had involuntary mainstreaming imposed on them through 'neglect'. This means that teachers and learners with special educational needs in these schools have had to cope with a multiplicity of learning and educational needs, in the majority of cases, with no support.* Lomofsky et al., 1998, p. 148.

Inclusive education presupposes the availability of strong and adequate educational support services. In South Africa this may be the situation for the small minority advantaged sector, but it does not apply to the majority of black learners who are already mainstreamed in ordinary schools where educational support services are almost non-existent. Although some white schools have opened their doors to black children with SEN since the early 1990s, Lomofsky et al. believe that the removal of entry barriers in the area of special needs will be slow. The re-organisation of the education system will be a long and slow process partly because of limited resources and partly due to the fact that the education authorities have decided to consult widely, to ensure the participation of all stakeholders in all aspects of education policy formulation. In their comparative analysis of the South African and Scottish education systems, Lomofsky et al. state that the principles and values of equality, access, redress and quality

education for all children are identified as common ideologies in the education systems in both South Africa and Scotland. They point, however, to the difference being that in Scotland these principles and values are entrenched in legislative and educational policy whereas in South Africa they are a novel and recent development in the country's constitutional law.

The research undertaken by the National Education Policy Investigation (NEPI) between December 1990 and August 1992 estimated that in 1990 there were 4,174,197 pupils with special needs in South Africa. Approximately 3,844,295 were African learners. (NEPI, 1992, p. 31.) They pointed to the fact that there was almost a total lack of services for SEN in the African Education Department. The legacy inherited in 1994 was of a peripheral and racially divided system of specialised education. Such a system was entrenched through separate legislation, as well as separate policy and funding mechanisms. Curriculum was inappropriate for preparing learners for the world of work. There was an over emphasis in many cases on the medical-deficit approach to the nature of the support and teaching provided and limited individual support.

The work of the commissions in 1996 was also influenced to a significant degree by the international drive for 'education for all.' i.e. single systems of education which were able to provide quality education for diverse learners, which would enable learners with special needs to access the curriculum effectively, and which recognised that enabling mechanisms such as particular forms of support were an integral part of the education system.

The National Commission on Special Needs in Education and Training and the National Committee for Education Support Services

The following section is based on the work of Howell, 2000, on the NCENET/NCESS report of 1997.

The two national commissions presented their joint reports in November 1997. NCSNET/ NCESS argued that two critical processes must take place if the system is to develop the capacity to meet the full range of learning needs. Firstly, the curriculum and institutions of learning must be transformed so that they are accessible to all learners. Secondly, an integral part of the education system must be effective and appropriate education support mechanisms that are able to facilitate the transformation of the system, as well as provide additional support to those learners who require it.

There are four main areas of focus around which the recommendations of NCSNET/NCESS are structured:

- Organisation and provision:

The report argues that the two systems of education which presently exist, i.e. specialised and ordinary, need to be integrated into one system. There is a need for the provision of more specialised learning programmes and forms of support. The proposed changes are consistent with a policy of inclusive education. Special schools will take on a support role,

> *where the expertise presently in schools can be used to sustain the development of capacity in existing ordinary schools to meet a greater diversity of learning needs, as well as offering more specialised programmes for learners who require them.* NCSNET/NCESS, 1997, p. 57.

There is also a need for a flexible curriculum which is accessible to all learners, whatever their learning needs. The report argues that OBE provides a very important framework for addressing diversity.

- An appropriate support system:

Together with a flexible curriculum, the most important component in building an inclusive education system is an effective and sustainable system of support which must facilitate the provision of additional help to those learners who may require it at any stage in the learning process. This will require the development of support teams at school level, and a support team based in a district office to assist all schools in a geographical area. The school level support team would consist mainly of teachers who would assist in providing other teachers with support, and who would facilitate the schools' access to resources in the community. At district level the team would include other support workers who could provide additional skills to teachers in the district, e.g. a counsellor or others with expertise within the community.

- Human resource development:

There is a need for in-service training to provide teachers with the skills they need to meet diverse learning needs, and to ensure they have access to ongoing support and learning opportunities. There is a need for pre-service training to focus on issues of diversity and to equip teachers with skills to sustain an effective, inclusive, education system. The Ministry of Education's document on *the Norms and Standards for Educators* (1998) outlines the competencies

required to meet diverse learning needs, and to address barriers to learning and development. These should form part of all training courses for teachers.

- Funding:

The report stresses the need for funding for the development of an inclusive education system which must be primarily directed towards the provision and development of support mechanisms and processes towards transforming the system's capacity to meet diverse learning needs.

The NCSNET/NCESS report states that the implementation process must be one which is characterised by the phasing in of the changes proposed, the harnessing of existing resources and the provision of on-going and sustained support to all role players in the system. Central to building an inclusive education system is the changing of attitudes towards different learning needs. Negative attitudes towards difference are particularly prevalent in South African society, which has a history of differences being emphasised, where legislation was specifically enacted to entrench differences and divisions. Education strategies will need to involve:

> *public education and awareness raising, the re-orientation of existing leadership, educators and education support personnel as well as the training of new leadership, educators and education support personnel who support the values and principles of such a system.* NCENET/NCESS, 1997, p.140.

The report by NCNET/NCESS outlined the shift which is needed. It built on the principles and commitments of the Education White paper of 1995, and through several enabling policies, e.g. the White Papers on Further Education and training and Higher Education, as well as the Ministry of Education's document

on the Norms and Standards for Educators, 1998, guidance was issued to the provinces on 'the need to accommodate diversity and address previous inequalities.' Howell, p.124.

Howell argues strongly that if the creation of equity for these learners is to be achieved, there need to be changes in the way differences in learning needs are understood, as well as in the organisation and practice of teaching and learning. This means that both attitudinal and structural changes are needed to develop a single system of education which is able to accommodate the full range of learning needs and provide quality education for all learners.

Special education provision in the Eastern Cape

When the Department was established in the Eastern Cape in 1994, the draft organogram included a joint Directorate for Specialist Services, Specialised Education. During the time of Hoosain's SMT, two working groups were tasked to come up with suggestions to address the area of special needs. The Specialist Services working group came up with the idea of creating a Directorate for Specialist Services to include counselling psychologists and other specialist support staff. The Specialised Education working group put forward a separate plan to create a Directorate of Specialised Education responsible for the Province's special schools. These working groups were merged, and in 1995 the Directorate for Specialist Services, Specialised Education was established. Its first mission was the amalgamation of the Specialist Services sections of the six education departments. As the working groups had membership from all the different departments, this amalgamation was achieved in 1995. From February

1996 work began to open up the institutions and the support centres/clinics, so that all children had access to them.

> *There was not much assistance available for African children, especially those that had other forms of special needs. There were no programmes available to assist learners who needed that kind of [specialist] service. It was only in the ex-Cape Education Department schools, and in the House of Representatives schools, that children had access to School Clinics, where the psychologists and other professionals would be based. White and coloured schools would have access to expertise from these centres. You wouldn't find anything like that in the ex-DET schools. So black children didn't have access to that in the past.* Interview with Interviewee No.1, March 2000

In April 1996 the task of populating the new Directorate with staff to be appointed to head office and the six regional offices began. The regional offices would accommodate the regional head of the specialist services, and specialist advisers for guidance and counselling, remedial services, speech and hearing, curriculum development, and institutional development. The process of filling these posts was completed by August 1996. However, as the Province's budgetary problems surfaced, the next stage of the appointment process to the district offices was cancelled. Of the 41 personnel to be located in the district offices only 5 posts were filled, and these posts were all based in the west of the region. The Sunset Clauses meant that there were, however, large numbers of officials who were being held additional to the district office's establishment. So, although the moratorium had been placed on any new appointments, there were officials on the ground who could carry out this work. The surfeit of staff also meant that only two of the appointments to the regional offices were new; the remainder had all been absorbed from the former departments. However, the reluctance of the EDOs

and district managers to visit mainstream schools extended to the special schools. Differential and protected resourcing did mean, however, that these schools were better supported than the vast majority of ordinary schools.

> *Before 1994 things were different. Financially we were better off than we are now. Before 1994 we had a budget. There was even a capital budget which allowed us to buy cars or to build a classroom.. We feel better provided for than the mainstream school. There has always been extra resources that special schools have had over ordinary schools: our fields are cut; we had more staff than them; we have got buses and 20 computers. So we are much better off.* Interview with Interviewee No.26, March 2000

The special schools were well-resourced pre-1996, but even they could not escape the budget cuts that were taking place across the province during Mrs Balindlela's administration.

Of the 44 special schools in the Province, there is a school for the deaf in Port Elizabeth and Umtata, a school for the blind in Port Elizabeth and in Umtata, a school for children with emotional and behavioural difficulties in Queenstown and schools for the physically disabled in Port Elizabeth, the Transkei and in Mdantsane township, East London. Thirty-two of the schools cater for children with severe learning disabilities. These schools were established by Mental Health groups and the Department then took them over, provided educators and registered them as schools. Following the political changes in 1994, the department found that many of the educators in these schools did not have the expertise to handle the children.

The push towards inclusive education required all departmental sections to embrace it, and for it to be infused into their daily operations. This did not happen

at head office until 1999 when the Specialised Education Directorate was merged with the Directorate for General Education and Training. At school level in the Eastern Cape, mainstreaming began to take place in 1997. At Vukhambe School for pupils with physical disabilities in Mdantsane township, there were on average 15 pupils full time in mainstream schools out of a total roll of 159 pupils. All were ambulant and did not require wheelchairs to gain access to the school's facilities and curriculum. The initial request for an inclusive placement and subsequent linkage was driven by staff at the special school, who supported their pupils in their mainstream placements:

> *The age range is from 5-years up to 24 years. Normally we should end at the age of 20 but their parents don't want them back, so we keep them in the houses. Because we were a primary school in the late 80s and early 90s, we were not affected by the student unrest. So our children still came to school unless there was disruption in their locations so we didn't feel that we could take the risk to pick up our day-scholars because we were afraid of our buses being bombed. Our school began to cater for the whole age range in 1996. Before 1994 the boarding accommodation was only for boys, and the girls were staying in a four-room house which was donated by the Cripple Care Society to us. In 1994 we ranged from about 175 up to 200 pupils. Most of our kids were discharged from the school without being educated. They had no chance of employment when they left school. It was just handwork so there was no preparation for life. When we were a primary school, most of the children would be taken at transfer age to Philadelphia High School in Soshanguve, Pretoria. That school would take children from other provinces as well who were blind and the physically disabled. But it would only take the best students. Of the 15 from my school only 5/6 were taken. Staff from the high school would come to school and interview them and give them aptitude tests. Those that did not get in may have failed because their language was not Afrikaans or Sotho. They could only speak Xhosa and English. So they took only the Afrikaans-speaking. Since 1994 in most respects things have deteriorated: the budget; communication with the Head Office and their ability to sort out problems, especially urgent problems at our school. We have never had a visit from the MEC, the Superintendent General, or the deputy*

permanent secretaries. There are no special school inspectors now. Interview with Interviewee No.26, March 2000

A programme [had been] introduced which led to a Special Education Diploma, SED. It meant that for a four week block people would go up to Soshanguwe to the in-service centre of the Department of Education and Training, to be trained... so in most of our own schools, it was almost tokenist. You could become an instant specialist in Special Education. That is what it was like at that time pre-1994 in the schools. Interview with Interviewee No. 26, March 2000

I would side with the view that says it was just a pseudo consultation process driven by experts which just cooked things up and then said to people what do you think? People would be given a month to respond, but the experts would already have a document agreed. Interview with Interviewee No.21, February 2000

There were so many programmes coming in at the same time, we found that we didn't have enough time to focus on one of them. Interview with Interviewee No.27, February 2000

PARTICIPATION

The political changes in 1994 enabled the department to operate for the first time on a consensus that brought democracy into the education arena, and for education decisions to be based on democratic and participative decision making. The changes also forced a new way of working on departmental officials that brought its own problems. Into the vacuum of the new government came the formal requirement for problems to be solved with meetings with stakeholders in the community. Officials from the former departments did not fully understand what was meant by consultation, true democratic functioning and the length of time it would take to properly consult with stakeholders. These stakeholders included different political parties, trade unions, church groups, traditional

leaders, women's organisations, some of whom had their own education desks. Officials had to consult with student organisations, who could be very destructive if they were ignored.

> *In your planning about the implementation of your project, you must give yourself enough time. That automatically affects efficiency. But at the same time there were more advantages if you delayed your implementation. There will be more benefits because people will own the project. Yes, consultation is very beneficial, it's part of democracy anyway, but I'm just saying as a manager it was very demanding. It had to be part of your actual project planning. Consultation had to be a crucial element in that planning exercise.*
> Interview with Interviewee No.12, February 2000

Brian Gilbert, Deputy Permanent Secretary in the Cape Education Department ran some of the early consultation meetings of white principals in the Eastern Cape during Hoosain's administration. The first meetings were separate ones for each of the ex-departments. He would take senior black officials serving on the SMT with him, so that it was clear that it was not the white department of the apartheid era talking only to the white principals. There was also a need for the SMT members to be exposed to the views of staff working in the departments they had not been working in, and for the white head teachers to be exposed to the thinking of people who would be influential in the future. Later, invitations were extended to school principals of all races and these were led by other members of the SMT. Meetings took place in Port Elizabeth, Grahamstown, East London, Uitenhage, King Williams Town, and Queenstown. These meetings were necessary as there was considerable anxiety and insecurity about the future.

> *School principals had been very critical of some political pronouncements that had been made. That generated insecurity and there was a lot of politicking still in 1994. But the support was there. When we talked about educational issues they were 100% behind us. And one went knowing that we were looking after the interests of education. They felt very vulnerable, because the impression had been created that the top posts were not going to senior officials from the ex-departments, so the loyalty from the old leadership wasn't there.* Interview with Interviewee No. 7, May 2000

Members of Hoosain's SMT also held briefing meetings in Port Elizabeth Umtata, Queenstown and East London with principals and officials from the former departments, at which the SMT provided an update of their work. The Regional Education and Training Forums were still active, and these were larger events than the briefing sessions as they were attended by student leaders, NGOs, and civic organisations, as well as school principals and departmental officials.

> *The time of the first department was a fairly consultative phase. We were evolving and the mood was also a policy mood. The orientation was about developing policy. So the context allowed us to spend a lot of time at workshops and conferences. It allowed that kind of engagement. Whether it was meaningful engagement is another story, but there was a sense in which people were going out and involving people and communities.* Interview with Interviewee No.2, February 2000

Mrs Balindlela continued to employ the system of stakeholder briefings/plenaries where the MEC, Permanent Secretary and other senior officials visited the major urban settlements in the Eastern Cape. Each Head of Section was required to present a progress report on their work and to listen to community representatives. Each plenary took place on a Saturday between 10.00

and 5.00. All political parties, parent associations, NGOs, governing bodies, teacher unions and teachers attended these meetings The effectiveness of these meetings is open to some question.

> *I think the good thing is that we have organizations such as SADTU who were critical partners and were powerful enough to be able to raise their own voice, an independent voice and say "No, this process is not involving us enough or this is nonsense" because it forces those who are creating it to look at what they are developing more critically. In fact I think more work was done in developing these policies by teacher organizations. The meetings organized by departmental officials achieved nothing. Teachers did attend these meetings but they didn't have direction. Those that were formed by SADTU had direction. They started in 1995 and they are still operating.* Interview with Interviewee No.21, February 2000

During this period, policy-related information was also communicated by the department by means of written reports, booklets and circulars. All department officials received copies of these materials. Schools received them spasmodically, and only by visiting a district office.

Over the lifetime of the first ANC parliament, individual NGOs were invited to work with the department in the transformation process. Departmental officials who knew about the work of individual NGOs included them in their consultations. Many commissions and committees that were part of the transition process in the Eastern Cape therefore involved the NGOs, where they had a voice and a presence in many of the meetings. Although the department invited a consortium of twelve NGOs to meet with them, the involvement of the NGOs was predominantly on a selective and piecemeal basis.

Between 1995 and 1996 the MEC initially had monthly meetings with all the teacher unions. This was changed to one-one meetings, where the MEC met the teacher associations separately to enable the unions have their say on policy matters.

> *This is in comparison with the old [apartheid] regime where you just had things rammed down your throat. But when it came to the implementation of a policy we weren't always consulted and our advice wasn't really taken in. On the surface they would ask for our views about what to do but in reality you knew they would carry on the way they wanted it, or the way they had planned things. So it was superficial consultation.* Interview with Interviewee No.28, March 2000

> *No, they didn't consult with us. You'll read things in the papers, you'll hear things on the radio, but we had to go straight to the office to hear it from the horse's mouth. And that is the case with most things. They make decisions without really consulting with us, especially the principals of schools, but their excuse is that they consult with the unions. I think it's not enough that they consult with the unions because they need to consult with the management of schools.* Interview with Interviewee No.6, February 2000

Mrs Balindlela also established officer working groups on which NGOs, teacher associations, and parent bodies were represented. There were working groups on special education, technical education, and early childhood education. There was also an examinations board, where commerce and industry, and the farming community and the unions were represented. In the provisioning section, there was a committee consisting of departmental officials, publishers and bookshop owners.

The department also had a 'crisis' task team which travelled to local communities throughout the province to resolve urgent and severe problems occurring at educational institutions. The task team held large community

meetings, similar to those which were held during the days of the struggle. The outcome of some of the institutional problems was the displacement of 300 school principals and other staff where the communities had threatened to kill them if they refused to leave the schools. They were accused of a range of crimes from the embezzling of school funds, to having affairs with students, to corrupt appointments. In some cases the principal may have been too tough on corruption and been forced out because over time corruption had become endemic.

Development forums were also established during Balindlela's administration. It was intended that they should be the interface between the local government (the municipalities) and its councillors on the one hand, and the community on the other. The forums were ward-based. Meetings were expected to take place on a monthly basis. Local needs, e.g. a school or clinic would be aired and discussed with local councillors and strategies agreed for their promotion through the machinery of the political and administrative system. Provincial officials would attend these meetings as appropriate.

> *I was amazed that people were not interested. They didn't want to attend the meetings. So the theory on how we should be functioning in society is good, but getting people to buy into the process is proving to be far more difficult than we thought it would be. It's a throw-back to the previous regime. It's partly a lethargy, and it's partly because people fear taking on the authorities. It's also because many of our people are not educated, and when they elect somebody, they elect somebody who they feel can do the job for them, they expect them to do it. And they feel that, as far as they are concerned as citizenry, they have done their duty, they have voted. They can now sit back. The people they have voted into power will deliver.* Interview with Interviewee No. 29, March 2000

CONCLUSION

To address effectively the huge backlogs in the Eastern Cape will require the national government to multiply its budget allocation to the Province significantly, over an extensive period of time. As this is unlikely to happen, raising the floor of the disadvantaged institutions in the Eastern Cape will be a long-term process. There is massive over-age enrolment in the school system because of the poor quality of the teaching and learning process and length of time it takes for students to work their way through the school system. It is clear that if some of the quality issues can be addressed then some inroads may be made in terms of the repetition of failure, and the huge demands placed on the province's personnel budget.

> *If we are unable to improve quality significantly fairly rapidly, then we are going to sit for the next two to three decades with a massive overload to the school system with the concomitant wastage of financial resources that this implies. So in order to wipe out the backlogs, and the inequity, we are talking about equalising in some sense and the only way to equalise really meaningfully in this context, is to raise the bottom up.* Interview with Interviewee No.4, March 2000

The chapter which follows, which is the final chapter of this thesis, will seek to position the findings of this research within the framework of existing theories of development, and conclude by returning to the main research question, as described in the first chapter: has educational restructuring since 1994 achieved the government's objectives of development, equity, participation and redress for

the black population of the Eastern Cape? It follows therefore that this chapter will include the writer's submission to the research question.

CHAPTER 7

CONCLUSION

We are prisoners of hope.(1)

THE APARTHEID LEGACY AND THE TASK OF TRANSFORMATION

Education in South Africa has been in crisis since the 1980s when schools became the breeding ground for student activism and the focus for much of the activity around the political struggle. It was during the years of the political struggle that the institution of the school suffered.

In truth this crisis has existed for far longer - since the introduction and institutionalisation of apartheid in 1948 - when the crisis in education was about norms and standards, the curriculum offer, the value of qualifications, the allocation of resources, and the pass rates, all of which were determined on a racial basis. This crisis in education has continued into the democratic era where, at the level of the school the crisis has developed around:

- the disappointing matriculation results at the end of 1997 (and beyond);
- the inflation of qualifications;
- the deterioration of standards;
- the migration out of the system of some of the most experienced teachers;
- the deep demoralisation of the teaching profession.

1: Interviewee No.23, March 2000;

Whilst there would be broad agreement that the education crisis in the Eastern Cape has its roots in the huge legacy of apartheid era, I submit that it also has its roots in:

- the total underestimation at all levels of government, of the aggregated sum of the challenges;
- what was required in terms of human effort and resources to maintain a forward impetus;
- the deeply rooted human resource problems inherent in the province within the regional and district offices;
- and the discomfort felt by the political and administrative leadership who became victims of policy overload.

This crisis was exacerbated by policy makers who were consistent in failing to understand the realities on the ground and the vastness of the province, the compound deprivation suffered by the education sector, and the mammoth task of rebuilding by provincial officials.

THEORETICAL PERSPECTIVES

In this analysis of the results of my empirical research against existing theories of development (economic and political), I begin by briefly reviewing Preston's (1996) and Harber's (1999) authoritative texts, and develop the discourse by examining the South African experience with reference to the work of other writers. Whilst it is not my intention within this thesis to carry out a

critical assessment of the claims of each theory, I will aim to identify the key issues which are perceived to relate to the South African experience.

As South Africa entered its transition to democracy at a time when the processes of globalisation were intensifying, the selected extracts from the work of Preston and Harber include references to the neo-liberalism, post modernism and partial dependency theories of development, as well as to democratisation and contextual theory. They have also been selected for their correspondence with the results of my research.

Preston's work is broadly concerned with post-1945 theories of development. In it he considers the nature of social scientific analysis, reviews the work of the major social scientists of the 18th and 19th centuries and assesses their impact on the 20th century, and examines the current debates within the field of development theory as they relate to global structures and agent responses. Harber examines the role of education in the context of a number of key theories of development: human capital theory, modernisation theory, dependency theory, correspondence theory, liberation theory, capitalism, socialism, green development, democratisation and post-modernism. Harber confirms that there are overlaps and links between the theories. Like Preston, his work is primarily concerned with post-1945 debates being a catalyst for anti-colonial movements leading eventually to independence in a wide range of former colonial territories.

It is Preston's view that 'the intellectual mainstream of development theory, with its key idea of modernisation, derives from the historical episode of the dissolution of the mainly European system of formal colonial territories.' p. 319.

> *In Africa, the initial legacies of the colonial period included state and administrative machineries, legal systems, educated and mobilised populations and so on. All these slowly ran down. As the economic changes of the post-colonial period progressed the residual pre-contract and colonial patterns of life began to be reworked...In Africa there were problems of political corruption, incompetence and instability.... The overall impact upon the Third World has been to reinforce the diversity of the area's patterns of integration within the global system; a mixture of dependent development and semi-detachment...* p. 287

Modernisation theory emerged as the key theory of post-1945 development. It is based on a model of modern society (USA) found in Western, capitalist and industrialised countries, where the emphasis is on economic growth and wealth creation. One of the basic tenets of modernisation theory is the notion that the modern society is capable of replication in traditional Third World societies where economic growth and economic prosperity are expected to be experienced, and that this will only occur when the majority of the population hold 'modern' values. Within this theory of development, schools and other social organisations are identified as modernising change agents.

> *Once this [Modernisation] goal had been promulgated the whole machinery of the development game came into action, and First World theorists came to lodge claims to relevant knowledge, expertise and ethic. ...Flowing from this, expert knowledge of social system dynamics was taken to permit the construction of appropriate machineries of intervention....Additionally such knowledge and expertise were seen to be the property of First World experts, and their local assistants. An asymmetric relationship was built into the very discourse itself. Positive*

> *social scientific knowledge was Western and the recipients of the Third World were taken to be essentially passive.* Preston, p. 320.

Harber believes that in South Africa, education policy is about developing schools as modernising change agents, when the reality of school organisations in traditional South African communities is quite different. For as Riggs observes 'in practice, social organisations [in developing countries] tend to reflect the actual values and behaviours of their surrounding society...' (p.53) – and he describes developing countries as having 'prismatic societies':

> *By this he [Riggs] meant that the societies of most developing countries, and the organisations that exist within them, are a synthesis - though not always a harmonious one – of traditional, long-lasting indigenous values and practices and relatively new ones imported during and after colonalism. They are neither fully modern nor fully traditional. As a result, within the form or façade of modern, bureaucratic organisation much that happens in schools will reflect older priorities and needs emanating from family and village as well as newer ones emanating from the Ministry of Education. For example, a basic tenet of modernity is regular attendance at a place of work and punctuality. However staff and student absenteeism and lack of punctuality are marked problems in schools in developing countries where harvests, markets and family responsibilities can take priority over schooling. Evidence from a range of developing countries suggests that schools primarily reproduce the values and behaviours of the existing 'prismatic' society rather than acting as independent agents of modernisation.* Harber and Davies 1997 in Harber 1999, p.54.

Harber, (1999), argues that one important response to the emphasis on economic growth and wealth creation manifested in human capital and modernisation theories is the need to recognise the importance of social justice.

> *The criticism is that a country as a whole may develop economically but contains large sections of the population who remain poor and underprivileged...Rather than simply hoping that the benefits of a wealthy minority will trickle down to the poor, there should be public investment, including education, in disadvantaged groups in order to provide greater equality of opportunity.* p. 54

The neo-liberal theory of development advanced by market-oriented, post-modernists presents a new analysis which is knowledge-based, geared to consumption in the marketplace and global in its reach with the Third World assimilated into the analysis as emerging markets. Post-modernism would reject any single macro theory of development. It argues for:

> *plurality, difference and diversity in human experience. In education it points to the great danger in the assumption that, for example, a particular school management technique that works well in one context necessarily works well in another. Educational issues, problems and resources can vary considerably from one context to another. The need to recognise a plurality of contexts of particular importance...[as there is a] tendency for educational formulas or recipes for school effectiveness, educational management or curriculum development that originate in Europe or North America to be imported uncritically and unadapted into the very different educational contexts of developing countries. ..contextual theory would stress above all the need first of all to understand the realities of the educational context and secondly the necessity for flexibility in finding relevant educational solutions to meet the plurality of national, local, institutional and individual needs in developing countries* (Harber and Davies 1997). Harber, pp. 66-67.

> *The theorists point to a new rapidity in technological innovation, and to patterns of production which are decentralised, multi-plant, multi-national and which adopt the flexible specialisation strategy such that a wide range of products can be made with designs quickly changed. The new pattern of production requires an educated, adaptable and complaisant workforce, coupled with government deregulation of the market. The restructuring of production takes place on a global scale, and the countries of the Third*

> *World are automatically drawn in as new locations for both production and consumption of global products.* (Preston, 1996, p. 277.)
>
> *Postmodernists argue that the extent of penetration of industrialist capitalist forms of life into Third World countries has increased very rapidly in recent years'..:material goods which were restricted in terms of their availability to the rich West are now widely available. Sony, Ford, IBM are now recognised globally; global cultural forms are now widely available (Hollywood Movies, Coca Cola, satellite TV); global travel in the forms of migration and mass tourism. The theorists of post modernity have argued strongly that a process of globalisation of culture is slowly taking place as patterns of consumption across the global system grow even more similar...The theorists point to the growth of consumerism amongst groups in the Second and Third Worlds who are able to take advantage of the new opportunities within the marketplace...* (Ibid p. 279).

Critics of 'post modernity' have argued that there is a need to recognise that equity and justice have to become key components of human development in the neo-liberal discourse or globalisation will simply produce a further round of dependent development with new nation states being forced into a new and partial form of dependency.

> *It may all be viewed in an optimistic libertarian fashion, a system offering freedom to choose and construct life-styles from open flows of knowledge, but the pessimistic reading sees a renewed centrality for capitalist market relations, and these are unequal.* (Preston p. 276.)
>
> *Critics have suggested that these patterns of consumption are available only to a narrow group and that the poor who lie outside the consumer sphere are subject to severe control.... At the present time the poor who make up the majority of the populations of the countries of the Third World are excluded.* (Ibid. p. 279.)

Bond (2004) argues that the:

> *socio-economic results of a ten year neo-liberal governing strategy must be reversed. It is no secret that Pretoria's home grown structural adjustment policy, co-authored by the World Bank in 1996, codified the pro-corporate economic philosophy inherited from apartheid. The result was the doubling of the formal unemployment rate from 16% in 1994 to*

> *32% in 2002. When one considers, in addition those millions of people who have given up any hope of finding a job, the rate rises to 43%. Both the public and private sectors shed more than 10% of formal sector jobs since liberation in 1994... inequality soared during ANC rule, state statistics show black 'African' South Africans suffered an income crash of 19% from 1995-2000, with every indication of further degeneration in subsequent years. ... Not withstanding deeper poverty, the state raised water and electricity prices, to the point that by 2002 they consumed 30% of the income of those households earning less than $70 per month. An estimated 10 million people had their water cut off according to two national government surveys, and 10 million were also victims of electricity disconnections.* (pp. 2-3)

and Kallaway observes that:

> *these policy approaches appear to ignore the links between the provision of education and the social and economic needs of the rural poor. The exclusive emphasis of the new policy formulations on the problems that arise from the global economy and the need for particular kinds of 'human resource development' that will encourage effective integration into the global economy effectively ignore 80% of the population whose lives will never be part of the global economy in any direct way and whose skills will be used in the village, the farm, the local factory or plantation.* (Kallaway 1998, p. 21.)

Harber argues that 'one significant theme running through development theory is the contrast between democratic and authoritarian forms of development. These broad models of a political system form either end of a continuum.. about political development.' (pp. 63-64). Increasingly, aid and loans from Western Development agencies have been contingent on democratic political reform. As a consequence of democratic reform in developing countries there has been a renewed interest in the question of how to create a political culture that is composed of values and behaviours both supportive of democracy and able to sustain it in the long run. As such values are learned and not acquired, there has

been interest in 'education for democracy'. This requires democratic education which has implications for both school management and the curriculum.

> *Since the late 1980s,... some form of democracy has become increasingly acknowledged as the goal of political development... Despite using a certain amount of Marxist rhetoric during the struggle for independence,...South Africa ha[s] adopted policies supporting multi-party democracies.* (Harber, 1997b, in Harber, 1999, pp. 64-65).

Legislation in South Africa has made elected school councils mandatory in all secondary schools. In terms of curriculum it means some choice for students as to what they learn, greater variety of teaching methods, with students being actively engaged in learning on a regular basis, plus a more diverse range of assessment techniques.

In South Africa's case, and within the paradigm of this study, the discourse begins in 1994 with the final collapse of apartheid and the dawning of democracy. The new government of national unity (GNU) was faced with huge challenges. These challenges are described at length in Chapter 4 of this thesis. Foremost, however, amongst all the political, social and economic challenges facing the new government, was the translation of the rhetoric of nationalist developmentalism, used by the ANC and its supporters in its struggle for democracy and freedom, into the achievement of economic growth, and redress and welfare for the masses. In the following extracts, Kallaway (1997) and Johnson (2003) explain the substance and complexity of the challenge thus:

> *Prior to the De Klerk reforms of 1990 protest [which was] aimed at the overthrow of the apartheid state dominated South African politics. A triumphalist discourse, based on notions of socialism and social transformation, prevailed in the broad liberation movement. Thus, in the minds of many people an image was conjured of a post-apartheid state*

> *which would deliver radical change and social transformation based on the redistribution of wealth.* (Kallaway, p. 70).
>
> *...Democratisation in South Africa in 1994 brought to power anti-colonial liberation movements that took control of the state machinery and reorganised themselves as political parties. But the inherited terrain on which the liberation movements found themselves was in many ways not the one they had prepared for. The independence process...led to the establishment of constitutional or parliamentary democracies in line with the Western Liberal model. Thus the transfer of power came about through negotiation, not through insurrection, and in a changed, post-Cold-War international context in which the forces of globalisation and neo-liberalism are hegemonic.* (Johnson, 2003, p.200).

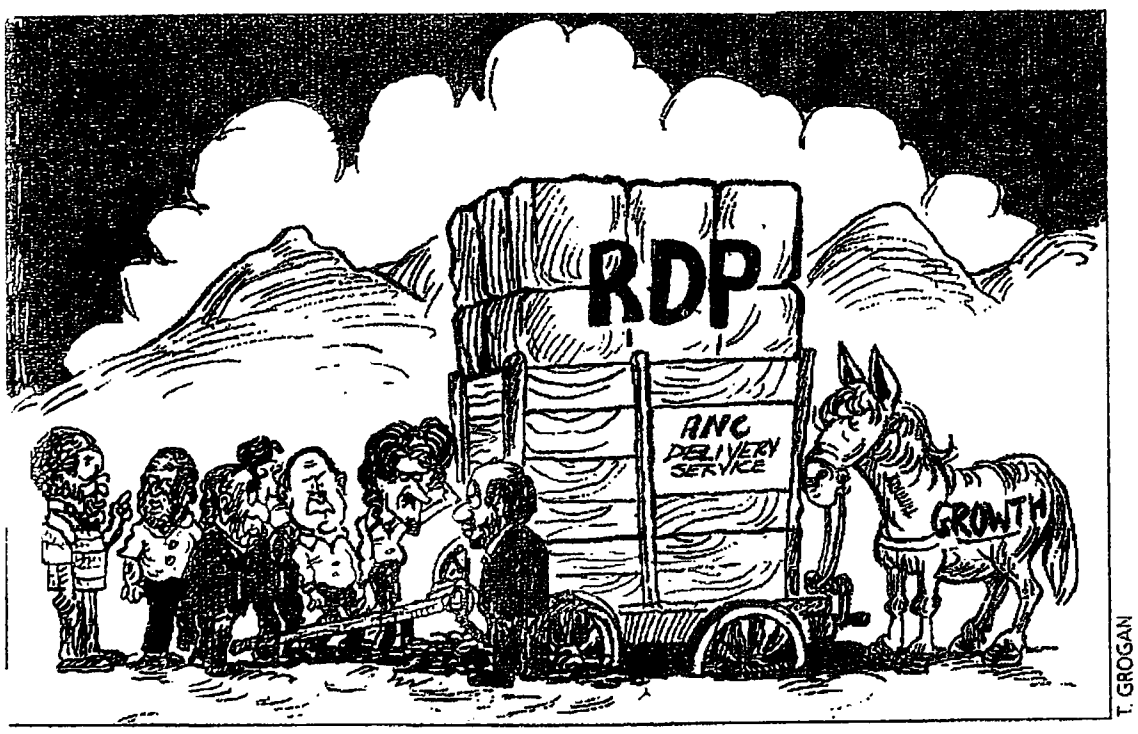
Although the new government's legitimacy was not in doubt, it had to demonstrate its commitment to rebuilding the country and securing political and social stability, balancing the seemingly competing demands of equality policies with economic policies if development and social transformation in South Africa was to take place. Badat (1997) argues that 'the way out of this impasse' is for the new government to recognise the duality of the competing claims.

> *It is imperative to accept that equality demands in terms of access and institutions cannot be relegated to some future period when economic growth has, so to speak, occurred. There are two reasons for this. The goal of equality motivated the struggle against apartheid and continues to be an extremely persistent and pervasive demand; and there is no guarantee, given the circumstances under which the transition is occurring in South Africa, that 'economic growth' will also entail redistribution and a secular trend towards 'general' equality.'* (Ibid. p.27)

To many commentators the GNU's launch in 1994 of its Reconstruction and Development Programme, (RDP), as a social democratic initiative, promised to maintain the focus on the social transformation agenda and in particular, on the redress of the apartheid legacy of social and economic injustices.

> *The set of ideas that drives the whole [RDP] package represents a marriage between what has been historically termed 'social democracy' and the new free market conservatism or what has sometimes been called the new World Economic Order. The first holds it as fundamental that the state needs to intervene in the social domain to secure the basic rights of the individual in civil society and to promote social equity and public welfare; the latter assumes that the free market will take care of such inequalities and advocates the withdrawal of the state into a much narrower public domain allowing the free play of market forces. In keeping with the post modern spirit of the age, the RDP would appear to want it both ways.* Kallaway, p.36

In addition to the alleviation of poverty and the meeting of basic needs, the government also saw the RDP initiative as a mechanism through which it could reconstruct the economy by combining growth with development.



"Why don't we try putting the horse before the cart?" *31 July 1995*

Source: Education after Apartheid, 1997.

According to Lodge, 1999, the office of the RDP sought to do this by:

- meeting basic needs;
- upgrading human resources;

- strengthening the economy;
- democratising the state and society;
- re-organising the state and the public sector,

and by involving and empowering ordinary people.

> *The RDP should be 'people-driven, that is, it should deepen democracy by enabling people affected by development projects to participate in their planning. Economic reconstruction and social development should be mutually reinforcing.... Development forums would bring together 'all major stakeholders' in formulating and implementing RDP projects. These bodies should represent political parties, NGOs, business and community associations....* (Lodge, p.27).

The government which had been elected to consolidate the gains of the struggle and advance the interests of the poor people, sought to do just that, by facilitating a budgetary reprioritisation process and a longer term expenditure planning initiative, by targeting its resources to the country's social infrastructure to maximise the impact on poorer communities. In 1994/5 the RDP budget was set at R2, 5bn. In 1995/6 this figure rose to R5bn. A further amount of R600m was voted in 1995/6 for expenditure on capital projects. In December 1995 the government announced that the budget allocations to the RDP for 1996/97 would increase to R7, 5bn. As a result of this investment, secured via a mix of redistributed government and overseas funding, the RDP office was able to report a number of specific social development successes, including:

- 'free health care - four times as many patients were treated in rural clinics following the inception of the programme in 1994;
- electrification - a total of 378,171 houses were electrified during 1994, exceeding the target of 300,000;

- primary school nutrition - over 5m children, out of the target of 6,8m benefited from the programme.' (South Africa Survey, 1995/96, p.562).

Whilst it was evident that there had been a fairly substantial reallocation of resources, the hard realities of an economic recession in South Africa became apparent. The government became more engaged with issues relating to the international competitiveness of the economy rather than with questions of direct redress and welfare. As a result, in 1996, the government announced that

> *there would be a change in the way the RDP fund was used. The focus would shift from relatively small individual programmes to support for programmes that cut across government departments and which encouraged departments to co-operate.* (South Africa Survey, 1995/6, p. 563)

The RDP fund was therefore no longer used as a channel for allocating resources to RDP projects which sought to reform the country in the interests of equity and redistribution. These projects would be funded through the relevant department's normal budgetary process, and as a consequence about 40% of the total RDP project funding was transferred to the provinces. The RDP office was closed in mid-1996. This is explained not only by the emergence of the belief that a new nation could only flourish if it was integrated fully into free market politics, but because it had become clear by 1996 that economic progress achieved via the RDP was slow. Lodge (1999) identified some of the reasons for the lack of progress as follows:

> *the state's capacity as a coordinator has been quite weak. Development projects... are implemented through provincial governments, and ...both their political complexity and their bureaucratic shortcomings make implementation of development policies extraordinarily difficult... Finally the state's commitment to people driven development seems to have been*

> *fluctuating and ambivalent. In many areas the trend has run against popular participation; ...The collapse of the development forums and the weakness of community-based organisations make it all the more difficult to engage citizens in development projects. Better-educated and hence more productive workers seem a remote prospect given the government's failure to improve the quality of public schooling.* (pp.38-39)

The path chosen by the government led to its assimilation into the mainstream of the world's economic order, to loans secured from the World Bank or the International Monetary Fund in return for the adoption of structural adjustment plans, to greater emphasis on private enterprise and free markets, to cuts in both taxation and public expenditure by the government in such areas as social welfare and education. The emphasis in policy development shifted to the market rather than to social need, and where the challenge for the government was to create a new South African nation which could compete in a global market.

According to Nzimande (1997) South Africa entered its transition to democracy at a time when the processes of transforming the world into a single world market dominated by the interests of big multinationals, mainly those from the most developed countries of the North' were being intensified:

> *Neo-liberalism is the ideology and discourse of globalisation. It argues that for a country to survive today, and compete in the international market place, it is important that it transforms itself into a fully-fledged municipality of the global village by completely opening its borders to the international market. Neo-liberal ideology is also marked by its intense attack on the nation-state, thus seriously undermining national sovereignty of many countries. The net effect of this process, particularly on developing countries is that delivery of social services such as education, health and social security is severely constrained.* (p. i, in Kallaway et al.,1997.)

Nzimande argues that globalisation and the Neo-liberal discourse has implications for education in that:

> *there is now a global discourse on knowledge and its production, which assumes that we need to structure and fashion our national education institutions to fit into this global reality, otherwise we perish or our education is not held to be up to standard. Arising out of this prescription is that national discourses on knowledge, development, the character of institutions and curricula are to be subjected to this supposedly progressive global reality.* (p. ii, in Kallaway, 1997)

McGrath (1997) points to the need for cross-sectoral approaches as a way in which developing countries can respond to globalisation pressures. Although South Africa produced a Reconstruction and Development Programme (RDP), he believes that it has been slow to co-ordinate policy interventions across sectors and to establish in particular the links which need to exist between the departments of Education, Employment and Welfare. A further issue for McGrath is the inter-connectedness of poverty and growth polices, and the need to ensure that an appropriate balance is reached so that there is not an over-emphasis on poverty at the expense of growth. McGrath believes that micro enterprises have an important role to play in poverty alleviation and in a developing country's natural development. For education policy makers in South Africa the challenge was to recognise the desperate need for human resource development at all levels, the need for a more productive society, and the need to create a curriculum which would encompass and promote the kind of knowledge, values and attitudes which would address national needs, and meet the future needs of a people living in a global village.

> *The national qualification framework for the country was asking two questions: How do we address issues of articulation within our life sectors? Industry, schools, technikons and technical colleges. How do these systems talk to each other to address the central question of economic development as well as how do our human resources adapt to changing economic climates? How do we address issues of mobility and progress within the system, so that if a person cannot cope well in academia, is there sufficient mobility in the system for someone to move onto the technical side? As a result, there has been a move towards unit standards, and the accumulation of credits within the system, such that if you look at our General Education and Training phase which are our grades 0 to grade 9, it articulates well with our Adult Basic Education and Training levels 1 to 4.* Interview with Interviewee No. 22, February 2000.

Hopper (1998) is far more critical of the effects of globalisation on schooling in Africa. She condemns the structural adjustment programmes which have been forced on African countries by western governments, bilaterally and multilaterally, in which an autonomous meaning of development has prevailed. Through this approach, forms of learning and education systems have collapsed into only one form of education so that schools are no longer natural organs connected in vital ways to African society. Although the colonial system has retreated, it has left behind a school system to operate as a kind of time-bomb. She argues for the need for African countries to become self-reliant, and for the wealth of experiences, knowledge and skills (behavioural, creative and linguistic) which African children have when they arrive at school to be developed, and not repackaged into individual compartmentalised subjects to be studied for passing an examination. Hopper argues for the need to contest the concept of universal civilisation which continues Western Cultural dominance over all other societies. In her view the school system is symbolic of all that is wrong.

> *We know that the way in which the education system operates, and especially its relationship with the surrounding community influence the pupils more than actual content. Yet curricula only pays lip service to the issue of relevance and adaptability, ability to work with each other, focusing instead on more easily evaluated cognitive achievements. Learning to live together is often relegated to an optional course rather than something central.* (1998, p.12.)

In her view, there is a need:

> *for development to be redeemed and for education to become the instrument to enable countries to participate in a co-operative and peaceful world not solely a competitive one. Effective ways of development delivery should be established through the community which enhances African cultural identity and recasts participation by parents.* (1998, p.12.)

Khoapa and Mzamane (1998) also propose a cultural approach to the current state and future direction of South Africa's education system. They believe such an approach to be necessary for the construction of both a framework and a curriculum for an education system that will restore the downtrodden and oppressed to the history and culture of the country, and at the same time validate cultural pluralism in its positive aspects in South Africa. They believe that these proposals could serve as a starting point in deliberations aimed at a suitable alternative education system in a transformed South Africa.

THE RESEARCH HYPOTHESIS

The increasing sense of hope from 1990 to 1994 which culminated in 1994 in the euphoria around President Mandela's inauguration and the arrival of a government of national unity, gave way five years later to a perception - broadly held amongst education stakeholders - that little had fundamentally changed for the marginalised communities of the Eastern Cape. Throughout the Province, but

particularly in the vastness of rural homeland areas, there was no visible improvement in the fabric of the schools or their operation. The hopes around the 'miracle' of 1994 did not bring the improved learning and teaching environments anticipated by many or the increase in classroom resources. The textbook delivery promised by President Mandela in 1998 did not materialise.

In the Eastern Cape, the Education Transitional Task Team (ETTT) was established early in 1994 to manage the transfer of power and responsibilities. It is questionable whether it, or the Hoosain administration which followed it, did little more than engage all the key stakeholders in consultations regarding the transition process. In 1994 teachers went back to their schools ill-equipped and unprepared to deal with the situation which prevailed. The dearth of pedagogical skills and the lack of training for the majority of teachers meant that many teachers struggled with the requirements of the new curriculum as it was gradually introduced between 1994 and 1999. Departmental officials were not able to travel to schools as there was no transport. Schools were aware that support services were available from the district and regional offices, but a combination of poor roads, the absence of telephones, a lack of transport, and serious issues around the competency and attitude of district officials created a climate of frustration, anger and apathy. Consequently schools received no support. Within this framework of educational impoverishment, schools regressed or simply marked time.

Although it formed no part of the evidence search for this thesis, it was noted that the communities served by these schools also failed to receive support in other critical areas. For example, there was no increase in employment

opportunities, and no impression made into the prevailing high levels of poverty. In some areas of the province which had been struck by the tornadoes of 1998, by 2000 repairs had still to be carried out to many school roofs. In these circumstances it is difficult to see how schools could have been successful in such poverty stricken environments.

It is submitted that the findings of this research substantiate the hypothesis that during the lifetime of the first South African parliament, national and local governments have been slow to achieve development, equity, participation and redress for large sections of the province's society. Pre-1994 there was a complete absence of a culture of teaching and learning in many areas of South Africa. Children were not going to school to learn, and teachers were not going to school to teach. This continued into 1994 and 1995. Teachers in some schools refused to respond to the government's call to restore a culture of learning and teaching in schools. The department struggled to deal with student/ teacher control issues and failed to ensure that the system was functioning at school level. As a result school principals complained of receiving no support from departmental officials and criticised the department for its compliance with SADTU, the largest teachers' union.

> *After the end of apartheid it was difficult for us at schools because the Department did not come out with clear-cut management principles and we were just left at the deep end, with children coming hard on us; teachers came late; some of them came drunk; some of them did not do their work; and some of them had affairs with the students.* Interview with Interviewee No.30, April 2000

> *There is an unwillingness on the part of those in authority to implement the law and to charge those teachers who behave improperly in schools.* Interview with Interviewee No.23, March 2000

The disrespect for structure and authority which had been part and parcel of the student response in the 1980s, continued unchecked into the new democracy. In 1994 it was extremely difficult for the schools to be effective as senior school pupils were still in control, and because of the failure of the government to intervene and state that formal education should now take place. This situation was exacerbated by the actions of SADTU which increased its membership and strengthened its position in the province's schools in the years that followed, and by the department's continued failure to intervene to deal firmly with the poor discipline of teachers in schools.

The intensity felt by black society about the rights of the individual were sadly not mirrored in terms of the individual's responsibilities to its community, workplace and country. South Africa had broken loose from the cage of the past, and in the aftermath of the liberation struggle, some secondary schools remained ungovernable, students continued to defy teachers, and both learner and educator felt little motivation to resume the learning process. Teachers did not go to work or did not stay at work. The new democracy was being abused.

There emerged an urgent need to refocus the minds of teaching professionals and students on effective teaching and learning, and to engender a culture of teaching and learning in the schools of the Province. As the new government structures were established, it became apparent that there was also an urgent need to refocus the minds of civil servants on the notions of efficient and responsive public service.

Lack of Effective and Stable Leadership

The lack of a stable and competent leadership at the highest levels of the provincial government to marshal the hopes of the new democracy is, I contend, situated at the heart of these difficulties. The Province had three MECs and four Heads of Department in 5 years, in contrast to other provinces where the senior leadership team was constant throughout the lifetime of the first democratic parliament.

> *We have had 2 strategic plans and 3 MECs. In 1994 we had an organisational structure that we did not fill completely. We filled about half of that structure. Then we had a 1997/98 organisational structure, which we did not fill, except for the four Chief Directors. So they filled the Chief Directors, and now that whole structure is empty.* Interview with Interviewee No.1, March 2000

As the leadership was so fragmented, the culture of the department which should have been institutionalised from the start, and stem from the leadership, was weak. The instability of the leadership team resulted in the culture of the department of education being extremely weak.

> *There is a need for a new ethos within the Civil Service, a corporate identity and corporate culture to be created and that depends on who is heading the Department and the extent to which the two compliment each other and can influence the system. If you don't have an on-going dialogue and interaction between the two, the system is lost. I think that has been a continuous weakness.* Interview with Interviewee No.2, February 2000

The organisation lacked a shared vision and departmental officials failed to identify with an organisation which had no shared values. This led to a situation where district officials in particular did not see themselves as part of the

Department. It is evident that this happened throughout the lifetime of the first parliament. For different reasons, neither Ms Hoosain nor Mrs Balindlela were in a position to build effective teams.

During Ms Hoosain's period in office, labelling in terms of the old departments and the old divisions continued to exist in 1994 and 1995. Schools did not identify themselves as part of the Eastern Cape Education Department. They still regarded themselves as being part of the old system. They were still very sectarian at that stage, and there was very little evidence within communities of a unity that would have driven children back to school. There was no unity of purpose in spite of the provincial ethos which was beginning to be felt by some members of the SMT.

There is evidence to suggest that Mrs Balindlela's Head of Department, Dr Van Wyk, had neither the background nor the support of other senior officials to lead a department, and that despite the political shift towards integration, the department was riddled with mistrust at this time. It was also weakened by the tension which developed between the administrative and political machinery – a tension which the province could ill afford during this period of educational transition, - and by the lack of a departmental culture and shared vision that gave rise to tensions both within it and within the community of stakeholders.

> *During Mrs Balindlela's's time in office there was a lot of mistrust. Management was divided into cliques and it created serious problems for the Department. It was a time when a lot of people exited the Department. So the culture was very toxic.* Interview with Interviewee No. 9, February 2000

> *Because of that lack of consistency of leadership, the hope was lost and an anger returned, particularly amongst departmental people at district and regional level, not to mention the teachers.* Interview with Interviewee No. 18, March 2000

> *I would say the biggest problem in 1997 was instability within the department and fear for the future...The Permanent Secretary was not removed from office, but he was sidelined ending up in an office, on his own, excluded from departmental matters. That was the first thing. This led to insecurity amongst the staff who were asking if they were to be the next one to be marginalised. This caused insecurity, eventually ending up in ineffectiveness. In the previous period we encouraged people to be creative and innovative, to come forward with ideas. All of a sudden they were scared.* Interview with Interviewee No.17, February 2000

Following the departure of Mrs Balindlela, there was an absence of management autonomy, and of the leadership taking charge of its future, its policy agenda and the prioritisation of policy initiatives. More importantly there was an absence of a leadership cadre in the department. This led to an indecisiveness on critical issues, to an unwillingness to take unpopular decisions and ultimately to a paralysis of the Department. Examples of this included the need to rationalize the number of Colleges of Education in the Province, the implementation issues around the training of teachers and the supply of learning materials for the new curriculum, the lack of efficient information systems, poor communication within the education structures as a whole, and the performance of the district offices in fulfilling their primary duty of service delivery and support to local schools, none of which was satisfactory, if it happened at all. During his time in office, Professor Mayatula was unable to provide departmental officials, teachers and teacher unions with the assurance that the culture of the organisation was going to change. With his focus on financial matters and the department's failure to resolve

Dr Van Wyk's contractual position, a leadership vacuum existed in the department. It is worth recalling the words of one of the senior directors in his reflections of the final two years of the first parliament.

> *When Dr Van Wyk left there was a hiatus of two years. Jonathan [Godden] first – then Tsengiwe, then Jonathan [Godden again]. It was the most difficult period in this department because there was no leader and there was no direction. It was difficult because the department was being run from the Minister's office. ..During that period of disturbance after Ronnie [Van Wyk] and Nosimo [Balindlela] left, nothing much was achieved. Nothing happened in any sphere of education during that whole period. Because there was no money in the kitty, nothing – we had no budget – besides the personnel budget, and there was a debt to be paid which we had inherited from our earlier days. So, no school building, no programmes, etc. I mean we sat in our offices. If it was not for the National Department in that period, this department would have closed down. As we didn't have a cent to operate, things came to a halt. All of us kept hoping that it could not be like this forever. We kept saying that something had to happen in education, and if we go, will education collapse in this province. This was the toughest period we went through. Much more so than when we started.* Interview with Interviewee No.18, March 2000

Lack of Administrative Capacity

At no time was the department seen to be a beacon of hope. More often it was perceived as if it would be derailed by officials whose personal baggage was likely to interfere with good government and effective and clean administration. Methods of working used by the administrative officials in the regional and district offices was determined by the majority interest group; that is to say ex Transkei staff. The Sunset Clauses produced an inefficient bureaucracy. As jobs were guaranteed, duplication was inevitable as was the creation of an over-extended and cumbersome public service sector. The education service was perceived to be accommodating officials who did not have capacity to carry out

their responsibilities and with no monitoring system to detect their deficiencies. Whilst the dehumanisation of black people during the apartheid era may be a causal factor here, the culture of the education departments in the former homelands is a more likely reason for the unproductive and demotivated approach to working within the new regional and district offices – a situation exacerbated by the lack of support, in terms of budgets, equipment, personnel and training to run these offices. Furthermore, returning political exiles expected public service posts in the new administrations as their due.

It is my contention that the cause of the problems experienced in the Eastern Cape between 1994 and 1999 can be traced back to the the lack of stable leadership, to the Sunset Clauses, the 'absorbing' of large numbers of civil servants from the former homeland departments, to the recruitment of 'returners' with no administrative experience to positions within middle-management at all levels of the education service, to the destructive actions of the largest teaching union, SADTU, and to the failure by central government to make explicit how government policy should be implemented without proper provincial structures.

POLITICAL SYMBOLISM OR POLITICAL OPPORTUNISM?

The non-change in educational reform after apartheid is explained by Jonathan Jansen's theory of political symbolism which provides a disturbing analysis of the last five years in South African education. Jansen argues that since the 1994 elections little has seemed to change, and that the pace and scope of change has disappointed many, particularly those who demanded radical

transformation. Jansen states that the experiences of many frontline staff, both in schools and in the administrations, suggested that progress was limited. Many of the teachers, head teachers, and the staff who were employed to work at circuit, district, region and provincial levels reported that they lacked suitable role models and that they were left feeling ill-equipped for their roles as agents of change. Instead they felt disempowered, deskilled and deprived of professional esteem and status. Much of the work to transform the education system was seen as being fragmented and lacking coherence.

> *The political problem was that, for all the dazzle of post-apartheid education policies, there was considerable distance between policy (official statements of intent) and practice (experiences of teachers and learners in educational institutions).* Sayed and Jansen, 2001, p.1.

Whilst Jansen readily acknowledges that in post-colonial states the lack of fit between education policy and education practice is commonly explained in terms of the lack of resources, the legacy of inequality and the dearth of capacity to translate official vision into contextual reality, he poses the potentially disturbing question: 'what if the policy was not intended to change practice or what if other primary motivations lay behind the generation of new policies rather than transforming teaching and learning in [South African] classrooms?' Jansen's theoretical position is one of 'Political Symbolism' as an explanation for non-implementation in South African educational reform after apartheid. Jansen bases his theory on evidence arising from seven case studies. Jansen claims that the making of education policy in South Africa is best described as a struggle for the achievement of a broad political symbolism to mark the shift from apartheid to post-apartheid society. Jansen further claims that his theory is supported by the

remarks of senior policy makers, one of whom was Ihron Rensburg, who in 1998, as the Deputy Director General of the National Department of Education, stated:

> *I am suggesting that we consider a typology which speaks of an overtly ideological political period (1994-1999) [which] reflected the shift from an apartheid ideology and politics, replete with its minority rule, balkanised, racially defined and resourced organisation, institutions and governance, to a democratic order marked in particular by non-racialism.* (1998, p.50.)

For Jansen, 1994 to 1999 was therefore about establishing the ideological and political credentials of the new government. This period should be distinguished, according to Rensburg, from the next period (1999-2004) which concerns 'consolidation and deep transformation.' Jansen reports that this position was taken also by people outside the government. Aubrey Mathole, a senior official of SADTU in 1998, seems to support Rensburg's views.

> *In [Rensburg's] characterisation of the two periods, 1994-1999 and 1999-2004, we would like to add the word symbolic to the first period because our government had to practically display a rapid departure from the apartheid education system* (1998, p. 66.)

The impression given by this chronology is that delivery will only come after the 1999 elections. Jansen asks 'Is there any guarantee that delivery will happen then?' (1998, p. 60.) Jansen's point is that there has been politics of symbolism at play in policy development, which he believes is disconnected from serious concern about educational practice. Where policy and planning are strongly connected, Jansen expects government to outline the steps that would be taken to implement government policies. This has seldom happened since 1994. Jansen believes that South Africa has a tradition since 1994 of policy making with little or no reference to modalities of implementation and that this will continue

into the twenty-first century. This view is supported by Claassen who two years earlier prophetically stated:

> *possibly the malady in South African education of bureaucratic inertia-numerous commissions, reports and proposals and little real change – will be perpetuated.* (1996, p. 492)

Jansen's argument is essentially that the over-investment in political symbolism at the expense of practical considerations largely explains the lack of change in South African education after the end of apartheid. This argument is based on:

- The public claims by politicians and education bureaucrats concerning the primacy of symbolic politics in education policy-making between 1994 and 1999;
- The prominence assigned by politicians to policy production rather than its implementation;
- The inordinate amount of attention paid to formal participation in policy processes irrespective of their final outcomes;
- The lack of attention to 'implementation' in official policy policy discourses on educational change;
- The way in which policy-makers invoke international precedent in the development of national education policies as part of an external legitimation of local change processes;
- The way in which international participants (mainly in the form of foreign-paid consultants) are drawn into and influence the development of national

policy-making as an extension of the legimitation role of post-apartheid education policies;

- The way in which national policy positions are validated through claims to South African incorporation within the globalisation of modern economies.

Jansen believes that politicians do not always invent policy in order to change practice. It often represents a search for legitimacy. The illegitimacy of the education system as a whole was the central policy problem that the new government inherited from its predecessor.

Whilst it is undeniable that all policies have symbolic value, that the transition period would be a very difficult period, and that one could not expect implementation overnight, I am extremely sceptical about the proposition that government ministers and senior politicians were uncommitted to effecting real change on the ground during the lifetime of the first democratic parliament. Their success was the development of a policy framework which they saw as fundamental to achieving major change. Their failure was a lack of understanding of the implementation deficits, and their insistence on policy pronouncements which had little chance of complying with the realities of the province's budgets. There is, in my view, something too convenient about Jansen's theory. The remarks by Rensburg and Mathole which were made towards the end of the first parliament have a ring of political opportunism about them. By 1998 it was evident that the government and the provincial administrations had failed to tackle the country's huge challenges, and that the translation of policy into successful delivery had been unsuccessful. Although the lack of capacity, absence of

resources and vested interests were key reasons for this, it is highly probable that government policymakers lacked a proper understanding of the local realities and constraints on the ground, particularly in the impoverished provinces. It is also clear that government policy makers had failed to give sufficient centrality to issues of implementation. It is questionable whether government policy as espoused in all the white papers and subsequent legislation was relevant to the South African context and properly reflected the needs of the country in the years immediately following the end of the apartheid era.

The first five years of democracy have brought very few tangible changes in the lives of ordinary people. Education in South Africa remains steeped in crisis and inequality despite the flurry of policy in the seven years since the first democratic elections. In my view the lack of change in educational practice on the ground can be summarised and explained by:

- a failure to deal with the power struggles, internal conflicts and nepotism,
- the lack of competency at provincial level,
- a failure to produce policies which were relevant to the time and context,
- the absence of basic school resources including textbooks and other learning materials,
- the steadily eroding infrastructure of public schools
- the lack of adequately trained staff, compounded by the process of teacher rationalisation, and the failure to provide suitable and sufficient staff development programmes,
- corruption and profligacy in the use of limited resources,

- the inadequacies and failings of bureaucrats and other administrations in the system as a whole
- a failure by government to recognise the realities on the ground,
- a failure to mobilise the provincial leadership,
- a failure to adequately communicate the vision to frontline staff,
- limited administrative and management experience in education and the public service sector as a whole,
- a failure to deal with violence in educational institutions.

It may also be explained by political decisions made by the national government in 1994:

> *All of the pre-1994 planning, in preparation for the handover, fell by the wayside in one fell swoop, and it happened with the appointment of the minister and the director-general at national level, neither of whom had been at all participants in the process of preparing for governance in the education sector... In the run-up to the election in 1994 there was a frantic period of activity and preparation and policy documents, trying to get to grips with budgeting in the public sector, and trying to anticipate the key policy processes, meeting with incumbent civil servants at the time – for the first time – we had never spoken to anybody who was a civil servant before. So in those periods we went around visiting education departments for the first time to get to know who people were, and on the basis of preparing to govern. We looked at the policy frameworks, the legislation, understanding the budgetary process and training people. And the same level of activity was taking place in virtually every sector. In housing and in culture and so on. And at some level we were co-ordinating and sharing experiences and we were feeding into the civil service unit which had been created in the ANC, but then following the election, the degree of follow-through of that into government, depended pretty much on the personalities of the people who went in in the end. And so if you look at the health sector as an example, there was complete follow through in terms of the work they had been preparing, the trajectory that they were on, they knew in advance almost who the minister was going to be, they'd set out their plans as we had done in the education sector. But in the end for some reason, political decisions were made, and we were landed with individuals who hadn't shared in that process, didn't understand any of what had been done, didn't agree with some of what had been done and in*

> *some cases just didn't do anything. And so, in some real sense there was – in the immediate crucial six months after the elections, there was insufficient clear guidance from the national level and everything was in disarray.. So in very many ways, I still contend that in terms of education transition in South Africa generally, we lost a tremendous amount of ground in the first six months. A major lesson is there to be recorded somewhere in public service transformations and situations of that kind. It took us three or four years to recover most of the ground that had been lost during that period. And provinces like the Eastern Cape really suffered as a result.* Interview with Interviewee No.4, March 2000

The extent to which this commentary is an accurate reflection of the events which occurred at a national level in 1994 is difficult to assess. What is well known, however, is that there had been considerable planning by the ANC prior to the handover of power in South Africa to ensure that it was in a position to manage the political changes and was ready to govern. It is clear from the evidence collected as part of this study, that in the run up to the change in government in the Eastern Cape, considerable planning around governance, structures and education transformation was taking place within the Regional Education and Training Forum (RETF). It is also clear in the Eastern Cape, at least, that all the pre-1994 education planning failed to materialise in 1994 as the political leadership proved to be incapable of providing the steer which was needed at that time.

CONCLUSION

The Eastern Cape department of education lacked the capacity to implement government policies. There was broad agreement that the people appointed to run the department were the major cause for the slow pace of redress, that staff in the district and regional offices were only paying lip service to the people, that corruption was endemic throughout the system, and that there was an urgent need for the department to prioritise the training of managers. It was evident that the government structures established in 1996 were not consistent with the demands and priorities of education in the communities. The district managers were frequently former school principals elevated to the status of district manager who lacked the administrative experience to manage at that level. As the district and regional offices were weak in terms of management and coordination capacity they brought little added value to the school.

The provision of new schools and new classrooms, the provision of school furniture, the training of teachers and governing bodies, and the supply of teaching and learning resources suffered from the lack of resources, and mismanagement. New schools were built but only with the assistance of overseas funding from the European Union and from Japan. (Tables 9, 10 and 11.)
Schools also lacked the ability to work collaboratively because of their isolation and poor communication links. Departmental guidance to schools was haphazard

and depended on each school's ability to press for essential and basic information, including government circulars from district officials.

TABLE 9	TOTAL NUMBER OF SCHOOLS, 1996 & 2000		
	1996	**2000**	**% Change**
Eastern Cape	5879	6260	+6%
Free State	2877	2500	-13%
Gauteng	2173	2204	+1%
Kwazulu-Natal	5174	5734	+11%
Mpumalanga	1879	1810	-4%
Northern Cape	527	482	-9%
Northern Province	4157	4261	+3%
North West	2365	2304	-3%
Western Cape	1703	1593	-6%
Total	**26734**	**27148**	**+2%**
Source: Department of Education, Report on the School Register of Needs 2000 Survey, 2001			

TABLE 10	NUMBER OF LEARNERS PER CLASSROOM		
	1996	**2000**	**Change**
Eastern Cape	55	43	-12
Free State	38	33	-5.1
Gauteng	34	33	-0.9
Kwazulu-Natal	45	40	-5.1
Mpumalanga	45	48	3.3
Northern Cape	32	26	-5.9
Northern Province	49	40	-8.8
North West	40	34	-5.8
Western Cape	33	31	-1.8
Total	**43**	**38**	**-5.2**
Source: Department of Education, ibid.			

TABLE 11 PROJECTED COSTS OF ELIMINATING THE CLASSROOM SHORTAGE, NOVEMBER 2000		
	Classroom Shortage	**Projected Costs**
Eastern Cape	23000	R2,3bn
Free State	3200	N/a
Gauteng	3015	R490m
Kwazulu-Natal	13455	R2,4bn
Mpumalanga	N/a	R700m
Northern Cape	0	R93m
Northern Province	17000	R2,2bn
North West	372	R604m
Western Cape	1198	R290
Source:	Mail & Guardian 17/1/00; Die Volksblad 2/11/00	

During the transitional period when the six former departments were still operating as agencies, it was very difficult for the new administration to put in place proper financial controls. As a result of this and other outstanding financial commitments, the improvident appointment of a large number of additional teachers, and the fact that most of the senior officials had no financial management experience, the department found itself with serious budgetary difficulties, and this affected to a very great extent the functioning of the Department from 1996 throughout the lifetime of the first parliament. The Department suffered the consequences of its inability to plan and prioritise its expenditure needs, and for the over-expenditure incurred during the years 1996 to 1997. Its non-personnel budget was dramatically reduced as debt repayment was the first call on it, and the national government imposed a Section 100 Notice on the Department heralding its intention to take over the financial administration of the province.

TABLE 12	SCHOOLS WITH ELECTRICITY			
	Number		% of Total	
	1996	**2000**	**1996**	**2000**
Eastern Cape	1316	2474	22	40
Free State	1207	1348	42	54
Gauteng	1876	2056	86	93
Kwazulu-Natal	1953	2485	38	43
Mpumalanga	956	921	51	51
Northern Cape	426	425	81	88
Northern Province	885	2175	21	51
North West	1053	1486	45	65
Western Cape	1502	1521	88	96
Total	**11174**	**14891**	**43**	**55**
Source: Department of Education, Ibid.				

Little positive impact was made by the department of education on the lives of Eastern Cape children, the majority of whom are living in the rural areas. This has meant that there has been little visible improvement except in areas where the department has been able to provide extra classrooms, and provide electrification.

THERE IS VALUE IN THE VALLEY*

In 1999, there was an increasing sense of disillusionment and anger amongst communities at the department's failure to achieve. The climate of confidence which existed in 1994 had almost disappeared in 1999, and *yet* it was apparent to all that despite the magnitude of the apartheid legacy and the absence of consistent leadership in the province, the framework for the Province to move forward was in place as a single department of education had been established.

> *I think they [the Eastern Cape Department of Education] have come a long way. Then I think we as a nation have come a long way, and that's contributed to the Eastern Cape situation... I think the framework has been created for that province to grow. To actually be in that situation now, five years on is a major achievement. In 1994 there wasn't a department – there wasn't an administration in the Eastern Cape, and if you discount the first 9 months, when nothing really happened, the province has got to where they are now, in three and half years.* Interview with Interviewee No. 7, May 2000

> *One of the major achievements of the new [South African] administrations (it could be argued that it was probably their greatest achievement) was the destruction of the 6 education departments. They did not attempt to transform/create a new education department from the six apartheid institutions. Politically it was important to remove every remnant of the oppressor's regime.* Jonathan Jansen

The political context in 1994 had required a swift and proper engagement between the six former education departments around the restructuring of the education service. The context required the Permanent Secretaries from all the former departments to work together, in a way they had not done before.

* Interviewee No.4, March 2000;

As the climate in 1994 was consultative and evolutionary, the context allowed senior officials from the former departments and stakeholders to spend time working together in workshops and conferences. During these workshops there was an orientation around the development of policy which had its origins in the work of the RETF. Collaborative activity involving the teacher unions, formal education sector, ANC Education Desk and the NGO sector took place during 1993-1994. It was hoped that this process of engagement within the new department would in turn bring consensus politics and democratic working into the education arena. Within the first three months of the establishment of the Strategic Management Team there was emerging within the process of engagement a sense amongst some members of the SMT, a provincial ethos and a sense that the SMT were pulling together as a broader team. The SMT set out to establish a new department, being exclusive of the six former departments, underpinned on a philosophy of reconciliation and non-alienation. The Hoosain administration saw it as their core mission to identify policy and legislation in need of revision and revocation. An organisational structure inclusive of regional and district offices for the single department was established during the Balindlela administration. A single Department was created in 1996 anchored on common, albeit imperfect, personnel and salaries (PERSAL) and financial management systems (FMS). The major achievement of the Balindlela administration was to make the Department operational at all levels of the structure. Although Mrs Balindlela precipitated the collapse of her own department, her tenure as MEC for Education saw her administration open space for people of colour at senior levels

within the department to take charge of the Province's education service, and establish a single overarching examinations authority for the Province's matriculation examinations. Previously students had written different examination papers set by the former departments. From 1996, students took the same matriculation paper irrespective of their race, colour, or where they lived in the Province. Mrs Balindlela also influenced the return to schooling of thousands of students and persuaded communities to take ownership of their schools. The registration of learners increased exponentially, particularly in the townships. In 1993, schools in the townships were controlled by activists and throughout that year there were disturbances on many secondary school campuses. In 1994 and 1995 there was still student and teacher absenteeism. The education system was dysfunctional. In 1996, the mood and language began to change. The campaign of telling children to go back to school and teachers to teach was beginning to impact in these areas. The Eastern Cape department commissioned the Universities of Fort Hare, Port Elizabeth and Rhodes to organise distance education programmes to improve the qualifications of the Province's teachers. The redeployment process meant that in some areas of the Province the teacher:pupil ratio did come down, albeit at a cost in terms of teachers' morale. (Table 13)

TABLE 13	NUMBER OF LEARNERS PER EDUCATOR	
	1996	**2000**
Eastern Cape	35	32
Free State	32	31
Gauteng	28	29
Kwazulu-Natal	34	34
Mpumalanga	36	39
Northern Cape	27	26
Northern Province	33	31
North West	29	29
Western Cape	26	31
Total	**32**	**32**
Source: Department of Education , Ibid		

The provincial department launched a literacy campaign and recruited thousands of learners in rural areas in particular, to join Adult Education Centres. The department was supported by the national department's Itutheng (Ready to Learn) campaign, through which the provincial government received funding to buy materials for adult learners, to pay for adult educators, and for the training of the trainers. Departmental officials also developed curricula for adult education classes. In addition to adult basic education, the department played a leading role in the development of programmes for early childhood development. Both sectors, adult education and early childhood education, were areas which received very few resources and attention during the apartheid era.

The department's special education section established education support centres to enable children with special educational needs to receive psychological assessments, and for schools to receive advice on dealing with children with behavioural and medical problems in all areas of the Province.

The first five years were years of transition. Much of the work of the department has been around setting up systems, evolving policy, and training people around the new legislation and the new policies. There has been a plethora of programmes around Curriculum 2005, early childhood development, and information technology systems which the department attempted to put in place. Around the implementation of Curriculum 2005, the constraint was always around resources. The South African Schools Act placed certain imperatives on the provincial department to put in place new governance structures in schools. Training modules were developed for the new governing bodies. These modules were translated into various languages, and trainers trained. A further significant policy development took place towards the end of 1999 around the funding of schools. Norms and standards for the funding of schools were developed to afford more equitable funding so more of the Province's resources went to the least resourced and poorer schools. By the year 2000, it was evident that the Province's budgetary problems were being resolved and that there was a second wave of leadership coming through who had been selected on merit.

South Africa is emerging from a past where the black man did things as a result of decree, with no opportunity for challenge, or involvement in the development of plans to a position where they are endeavouring to become the authors of their own destiny.

> *At the present time, if one looks at the school, there are two worlds in South Africa. Schools in the informal settlements and the townships, and in the white residential areas are in completely different worlds. There is a need to create and nurture centres of excellence in the midst of the poverty in which many people live to counter the perception and reality of two worlds because the process of transformation has been essentially disruptive, so that schools and the communities they serve in the township and rural areas cease to be dependent on the state, and become agents for change and responsible for their own development.* Interview with Interviewee No. 2, February 2000

This thesis has reported the findings of research undertaken in the Province of the Eastern Cape during a five year period from 1994 to1999. It has taken as its starting point the dramatic events around the end of apartheid in 1994 and explored the work of the first, and subsequent departments of education in the Eastern Cape up to 1999, to try to understand their effectiveness in achieving development, equity, participation and redress for large sections of the population of the Eastern Cape. It has been the intention of the writer to do this as clearly as possible, to refer to the scholarly work of other researchers as part of each chapter, and to point to the substantial and significant issues around the key dynamic of policy development and policy implementation. I see the large amount of evidence obtained through the interviews and documentation as the strength of the study. Its originality is reflected in the quality of the commentaries of the many people I interviewed, who, I believe, provided a rich source of information. The thesis has concluded with a brief outline of the major, and smaller achievements of the Eastern Cape department of education, which I feel should not be lost in the reporting of the numerous difficulties and huge challenges facing the province which, above anything else, are a reflection of the enormous legacy of a corrupt regime, rather than the failings of the new bureaucracies which lacked capacity, at

every level, to achieve redress for the marginalised communities of the Eastern Cape in the first five years of the new democracy.

I would see particular value in this study being extended by further research which explores the work of the provincial department of education from 1999-2004. My own field work saw evidence at the beginning of the new millenium of the education department coming under strong and competent leadership, both at a political and administrative level. It also finally saw the department shake off the debt which had severely limited its ability to step forward and to carry out redress for the large black community within its boundaries. There was therefore considerable hope in the year 2000 that local people would witness development and redress in their communities. The extent to which that was actually achieved during the lifetime of the second parliament would provide a logical extension to my own work, as would a study which focused on the extent to which there has been real development, equity and redress in either the Western Cape or Gauteng, the two most developed provinces in South Africa. The limitations of my own resources, as a part-time and single researcher, prevented any consideration on my part of this further work. I also believe that there is an urgent need for research to be undertaken into the important area of rural development and the reduction of poverty, and the role that schools and education in general can play in the development of sustainable communities in rural southern Africa.

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APPENDIX 1

INTERVIEW QUESTIONS

1. Identify the informant.

2. What is your current job title and position within the organisation?

3. What does your current job consist of?

4. To what extent has your job/responsibilities changed since 1994?

5. In what way(s) has the structure of the department changed since 1994?

6. What proportion of the senior positions in the current administration consist of staff who previously worked in the former education departments?

7. Were you required to appoint new staff to the new department according to particular ethnic or racial ratios?

8. Do you believe that the Eastern Cape has a number of unique challenges? If so, what do you believe these to be?

9. Do you think there is sufficient recognition/understanding by national government, and the educational and local community of the challenges confronting this province?

10. To what extent did the department receive support (technical, financial and professional) from national government to enable it to implement government policy?

11. To what extent did the department receive support and guidance from external bodies/consultants?

12. Do you feel that there has been a lack of definition in policy documents about national government and provincial government responsibilities?

13. To what extent were provincial department staff involved in policy formulation at national government level?

14. What systems and processes did the provincial government establish to consult with and involve the wider community and the main stakeholders in policy implementation arrangements?

15. What would you say were the significant achievements and the major disappointments of the department since 1994?

16. Looking back, has the department in your view had the right management structures/systems in place over the last 5 years to undertake its functions?

17. Are you satisfied that enough has been done by the department since 1994 in terms of the provision of educational opportunities for learners?

18. How would you describe the level of competency, efficiency and effectiveness of the staff working within the provincial department, regional and district offices?

19. How would you describe the level of satisfaction amongst stakeholders about the quality of education on offer to learners in the Eastern Cape?

20. What was the nature of the challenges facing the department during the last 5 year period?

21. In your view, what was the extent of the department's success in tackling these challenges?

22. Do you believe that the government's curriculum policies reflect the present needs of the country e.g. the focus on scientific skills, education for democracy, integration of education and training?

23. Do you believe that the governments' policy makers have given sufficient centrality to the issues of implementation?

24. Do you believe that policy makers actually understand local realities and constraints on the ground and appreciate the factors preventing/limiting effective implementation?

25. Is it your belief that the provincial government has promoted a climate of dialogue and debate amongst all the different levels of policy implementation?

26 How did the department ensure the involvement of the local community in implementing government policy?

27 How did the department ensure that the needs of the marginalised were addressed in the implementation of government policy?

28 Since 1994, have you seen significant improvements in the effectiveness of the department to implement government policy?

29 Would you say that the Eastern Cape has been able to move forward since the education crisis of the 1980s?

30 Do you believe that since 1994 the department has achieved the goals of educational development, equity, participation and redress for the education community in the Eastern Cape? If so, in what ways?

31 Do you believe that the government's emphasis on market led policies rather than social democratic, re-distributive ones has been the correct way forward in terms of redressing the social and educational inequalities of the past?

32 Do you believe that the department has developed an effective method of delivering an education service in the Eastern Cape?

33 Has the method of delivery been community focused and has it promoted parental partnership?

34 What proportion of the Eastern Cape schools have governing bodies in place?

35 How many of these are quorate?

36 Do you have a training programme in place for training governors?

37 To what extent is Outcomes Based Education (OBE) taught in schools in the Eastern Cape?

38 Do you believe that OBE is appropriate for South African schools at this time?

39 How far has the department been able to achieve the objectives of redress and equity?

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Abdication by School Heads
ABET
Absence of Effective Teaching and Learning
Absence of Management Systems
Absence of Social Workers¦Social Problems
Absence of Support from the District/Regional Officers
Absence of Teacher Development¦Teacher Support
Abuse of School Buildings
Achievements of the Education Department
Administrative ineffeciency
Administrative Overload
Admissions Policy¦Admission Arrangements
Adult Basic Literacy
Affirmative Action
Age Range
Allocation of Resources
Appointment and Dismissal Process
Appointment of Middle Managers
Appointment Process¦Methods of Working
Attendance Registers
Attitude of Parents¦Communities
Attitude of Teachers
Bantu Professions
Batho Pele(People First)
Bengu
Better or Worse
Black Middle Classes
Boundary Disputes
Budgetary Difficulties¦Lack of Resorces
Bussing of Pupils
Capacity Building
Catchment Areas
Centre- Province Relations
Centres of Excellence
Challenges Facing the Department
Challenges Facing the Department (2)
Chaos
Church Schools
Ciskei
Communication
Community Use of School Buildings
Competency¦Effectiveness of the Department
Complacency of the Dept,
Composition of the District Office
Concerns re: School Inspectors
Consultations with Stakeholders
Corruption
COSAS
Council of Education Ministers
Crisis Management
Culture of Teaching and Learning and Service (COLTS)
Current Employer
Curriculum 2005

Curriculum Matters
D.E.T.
Decentralisation
Delay in Handover of Powers
Delegation of Funding to Schools
Delivery
Democracy¦Transparency¦Participation
Differences between the Transkei and Ciskei
Differences in Levels of Resourcing
Disadvantaged Schools
Disillusionment of Teachers
Displaced Staff
Displaced Teachers
Dissemination of Information
Distance Education
Distance Education Project for Teacher Development
District Managers/District Offices
Donor Support
Dysfunctional System
Early Childhood Development
Eastern Cape Context
Eastern Cape Education Act
Education Department Structure 1994/1995
Education Development Centres
Education Development Officers
Education Management Information Systems
Education Standing Committees
Education Structures in 1995
Education Transition Task Team
Education Transitional Task Team
Effeciency of Officials
Effective ManagementStructures
EMIS
Employment History
Equity
Establishment of Regional and District Offices
Establishment of the First Department
External Consultants
Factors limiting Change
Failures of the Department
Farm Schools
Fear of the Unions
Federal System
Feeding Scheme
Finance Department
Financial Legacy of the Balindela Administration
Financial Mismanagement
Free Education
Future Hopes
GEAR
Globalisation
Governing Bodies
Headcom
Headteacher Associations
Heath Commission
High Expectations
Home Affairs Department
Hospital Schools
Hostage Taking
Hostel/Boarding Accommodation
IDASA (Independent Democratic Association of South Africa?

Imbewu Project
Ineffective Use of the School Day
Ineffectiveness of the Department
Interference from Central Gvernment
Involvement of Parents
ITEC
Itutheng-Ready to Learn
Jonathan Godden's First Administration
Jonathan Godden's Second Administration
Kader Asmal
Lack of accountability
Lack of Capacity
Lack of definition of roles of National and Provincial Governments
Lack of Delivery
Lack of Discipline in Schools
Lack of Effective Leadership
Lack of Financial Controls
Lack of I.T.
Lack of Information
Lack of Infrastructure
Lack of manpower within the Treasurers Dept
Lack of Resources¦Lack of Facilities
Lack of Stability
Lack of Technical Skills
Lack of Training
Lack of Transport
Lack of Understanding by Policy Makers of Realities on the Ground
Lack of understanding of realities on the ground
Language
Legacy of the Past
Mainstreaming
Managerial Weaknesses in Regional and District Offices
Matric
Meetings between the MEC'S and the Teacher Unions
Meetings with School Principals
Methods of Working
Mismanagement of Funds
Model C Schools
Multigrade Schools
N.G O's
Name and Position
National and Provincial Responsibilities
National Education and Health Workers Union(NEHAWU)
National Education Crisis Committee
National Government Support
National Qualifications Framework
Needs Survey
Neela Hussain's Administration
Nepotism
Norms and Standards for Schools Funding¦Delegated School Budgets
Nosimo Balindela's Administration
Operation Fundisa
Opportunities for Learners
Organogram
Outcome Based Education
Overcrowding
Pace of Change
Partnerships between Schools
Patronage
Peripaetic Teachers
Personnel Department

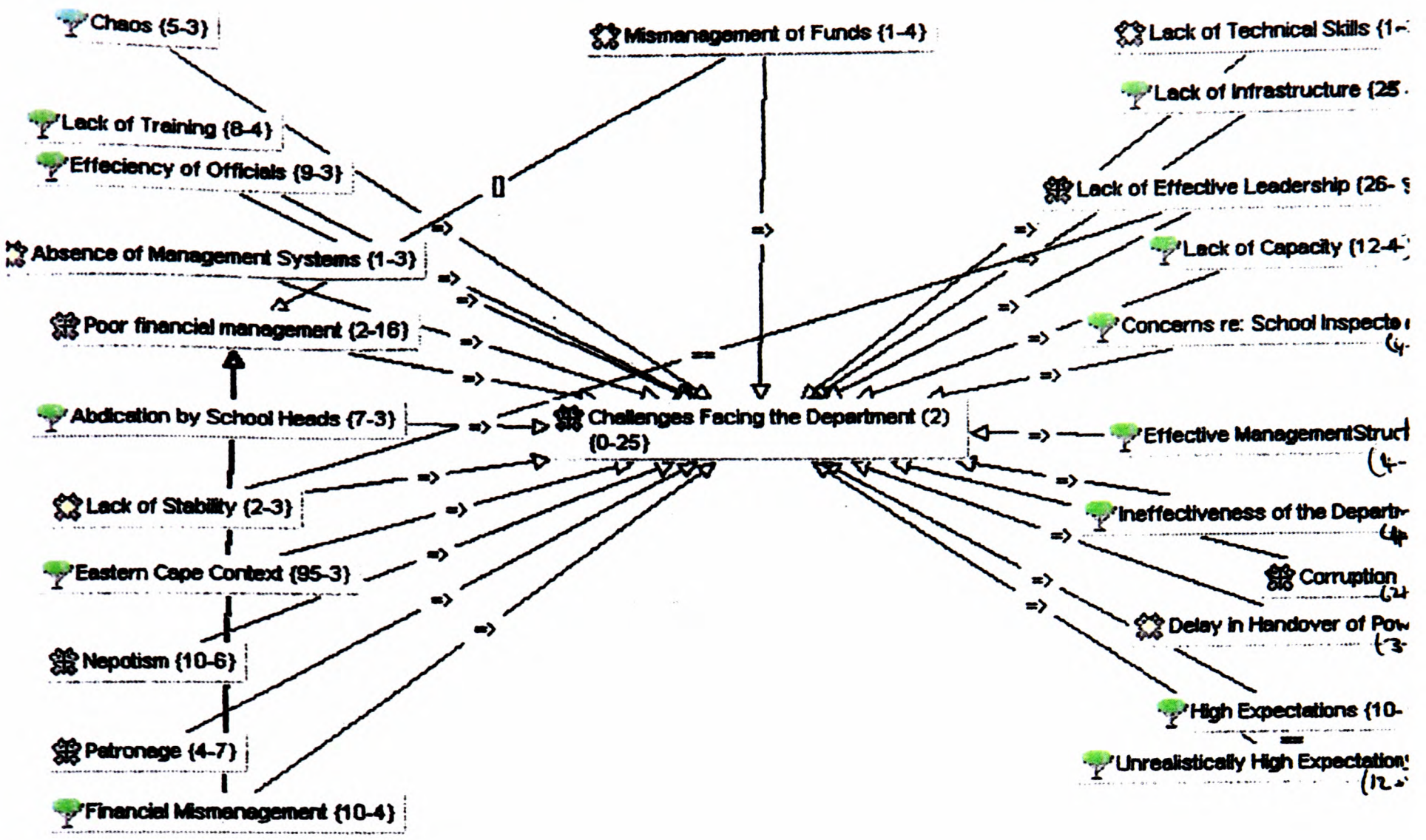
Physical Abuse
Physical Planning Department
Policy Formulation¦Policy Implementation
Policy Implementation
Policy Overload
Political Economy of Education
Poor financial management
Positive Affirmation
Pre-1994 Planning Forums
Pre-1994¦Historical Background
Presidential Education Initiative
Privatisation
Procurement
Professional Competency of the Regional and District Staff
Professionalism of Teachers
Proposed Restructuring of the Regional and District Offices
Province-Province Relations
Provincial Departmental Structures
Provincial Education Transformation Forum
Provincial Financial Imbalances
Public Services Commission
Public Works Department
Pupil Teacher Ratios
Racial Groupings in Schools
Rationalisation and Redeployment
Rationalisation of School Buildings
Reception Year Funding
Recognition of Weaknesses withinin the Regional and District Offices
Reconstruction and Development Programme
Redress, Access, Participation and Equity for the Marginalised
Regional Differences within the Eastern Cape
Regional Education and Training Forum
Regional Education Forum
Regional Structure
Regional Variations in Capacity of Regional Offices
Relationship between the Principals and Civil Servants
Removal of the Transport Subsidy
Resourcing in the Apartheid Era
Resourcing of Schools
Restructuring of the Provincial Education Department
Retrenchment of Civil Servants
Retrenchment of Teachers
Role of Political Activists
Role of the ANC
Ronnie Van Wyk
Rural Schools¦ Township Schools
Sabotage¦Passive Resistance
SADTU
School Building Programme
School Classroom Backlog
School Committees
School Fees
School Places
School Transport
School Twinning
Section 100
Selection Criteria
Self Managing Schools
Senior Management Team
Shepherd Mayatula's Administration
Shortcomings of the Dept.

Social Democratisation versus Globalism
South African Council for Higher Education(SACHED)
South African Council of Educators
South African Schools Act
Special Education
Special Educational Needs
Special Schools
Staff Expertise
Staff Recuitment Crisis
Staff Training¦Capacity Building
Status
Stone Sizani's Administration
Strategic Management Team
Strategic Plans
Student Boycotts
Subversive Teachers
Sunset Clauses
Support from National Government
Support from the Churches
Teacher Qualifications
Teacher Recuitment Crisis
Teacher Support Groups
Team Building
Tension between the Political and Administrative Machinery
The Education Act
The European Union
The Japanese
The Labour Relations Act
The Teacher Unions
Tirisano
Training of Regional and District Officials
Training of Teachers
Transfer of Powers
Transformation
Transition
Transkei
Tsengiwe's Administration
Underqualified Teaching Force
Understanding of Difficulties by the local Community
Unemployment
Unity
Universities and Colleges of Education
Unrealistically High Expectations
Van Wyk's Senior Management Team
Voluntary Severance Packages
Vusi Sizwe Trust
Welfare Department
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Absence of Teaching and learning Culture in Schools {0/Co} - Super
Added Value {0/Co} - Super
Adult Education Budgets are Sacrasanct {0/Co} - Super
An Education Department in Waiting {0/Co} - Super
An Education System Sensitive to Merit {0/Co} - Super
An Inability to Prioritise Priorisation {0/Co} - Super
Benelovent Dictatorship {0/Co} - Super
Black Middle Classes->37:18 {0/Co} - Super
Breakdown in the Partnership Process {0/Co} - Super
Capacity of the Regional and District Staff->12:49 {0/Co} - Super
Centre-Province Relations {0/Co} - Super
Centres of Excellence->25:42 {0/Co-F} - Super
Chaos of Restructuring {0/Co} - Super
Civil Service Ethos {0/Co} - Super
Collaborative Working in 1994/5 {0/Co} - Super
Conflict between the MEC and the Department Head {0/Co} - Super
Crisis in Education {0/Co} - Super
Dependency to Agency {1/Co} - Super
Dismantling of the Apartheid Institutions {0/Co} - Super
Education for Liberation->29:40 {0/Co} - Super
Education Standing Committees->29:29 {0/Co} - Super
Factory Work {0/Co} - Super
Failure in 1994/5 by the ANC to promote Normalisation {0/Co} - Super
Financial Mismanagement {0/Co} - Super
Fixing A Ship at Sea {0/Co} - Super
Freedom Now and Education Later {0/Co} - Super
Government Shift in Focus {0/Co} - Super
Ideological Realities {0/Co} - Super
Lack of Teacher Training {0/Co} - Super
Lack of Technical Skills->25:24 {0/Co} - Super
Lack of Unity of Purpose in 1994/5 {0/Co} - Super
Legacy of Apartheid {0/Co} - Super
Need for a Revival in the Culture of Teaching and Learning and Public Service {0/Co}
Neela Hussain's Administration {0/Co} - Super
Nothing has Changed!! {0/Co} - Super
Philosphy underpinning the Appointment Process {0/Co} - Super
Political Economy of Education {0/Co} - Super
Poverty of the Provincial Government {0/Co} - Super
Previously/Presently Disadvantaged Schools {0/Co} - Super
Progress is Relative {0/Co} - Super
Relationships with the Teacher Unions {0/Co} - Super
Resourcing in the Aparthied and Post-Apartheid Eras {0/Co} - Super
Return of Political Exiles {0/Co} - Super
Scepticism abounds regarding the proposed restructuring {0/Co} - Super
Show me your schools and I will show you the calibre of your nation {0/Co} - Super
Structural Upheaval {0/Co} - Super
The Work of the Strategic Management Team {0/Co} - Super
Transition from old apartheid Structures to new democratic ones {0/Co} - Super
Two Tier System {0/Co} - Super
Unpreparedness for the New Liberal Environment {0/Co} - Super
Unskilled Teaching Force {0/Co} - Super
Value in the Valley {0/Co-F} - Super
White Paternalism {0/Co-F} - Super



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