

PRINCIPALS' PERCEPTIONS OF THE ROLE OF TEACHER UNIONS IN THE
EFFECTIVE MANAGEMENT OF SCHOOLS IN THE NDWEDWE AND MAPHUMULO
CIRCUITS , KWAZULU - NATAL .

BY

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Submitted as a dissertation in partial fulfillment of the requirements
for the degree of Master of Education .

University of KwaZulu-Natal
April 2004

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SUPERVISOR'S STATEMENT

This dissertation has been submitted with / without my approval.



Prof. Relebohile Moletsane

April 2004

DECLARATION OF ORIGINALITY

I, **OSBORNE THULANI SIKHOSANA** declare that this dissertation entitled
**“ Principals’ perceptions of the role of teacher unions in the effective management
of schools in the Ndwedwe and Maphumulo circuits , KwaZulu – Natal ”** is my own
work and that all sources I have used or quoted have been indicated and acknowledged by
means of complete references. It has not been submitted before for any degree or
examination in this or any other institution.

A handwritten signature in black ink, appearing to read 'O.T. Sikhosana', written over a horizontal dashed line.

O.T. Sikhosana

DURBAN

APRIL 2004

ACKNOWLEDGEMENTS

I am highly indebted to the following for being so instrumental in making this study a reality:

- The Almighty Provider for His omnipresence throughout my study.
- The Department of Education : EThekweni Region for granting me permission to conduct this research in Ndwedwe and Maphumulo circuits.
- Messrs. A.G. Mthembu (former Circuit Manager : Ndwedwe) and N.W. Mzoneli (former Circuit Manager : Maphumulo) for allowing me to conduct a study in their respective circuits.
- Prof. Relebohile Moletsane , my supervisor , for her undivided dedication , persistence and consistency in critically evaluating my study.
- Dr H.Z. Mzulwini who always inspired and encouraged me to face the world of research and its challenges.
- The university Media Resource Centre staff , particularly Ms. Thobeka Ramncwana for her ever present support , patience and willingness to assist.
- NATU and SADTU branch and regional officials for consistently providing me with all the support that enabled me to conduct this research.
- NATU and SADTU selected branch members who sacrificed their precious time by availing themselves for interviews.
- My colleagues from both Ndwedwe and Maphumulo circuits who willingly helped me with the collection of questionnaires from selected principals.
- Ndwedwe and Maphumulo selected school principals who willingly completed and timeously returned questionnaires supplied to them.
- My late father , William Batanana , who could not live to realize my dream come true as well as my mother Clarice Nomusa (Ma Mbatha) , who jointly gave me a right direction in life.
- My inspirational wife , Nomkhuleko (Ma Ncayiyana) and our loving children Musa , Lungelo and Mbalenhle who were ever supportive to me throughout this study.

ABSTRACT

A number of school – based conflicts which tend to impact negatively on the entire running of schools , are reported each academic year to the Department of Education (DoE) officials by concerned role players. The said conflicts have resulted in a continuous and destructive tug - of - war between some principals and teacher union members , thus causing school principals unable to perform their core functions to the maximum. Worse scenarios have seen a number of learners drawn in causing mayhem and complete ineffectiveness to some schools.

Firstly, the intention of the entire research project was to provide a survey approach which will focus on the principals' perceptions of the role of teacher unions in school management. Secondly, this study sought to address how school principals perceive their own management roles in unionized school environments. Thirdly , the study further sought to look at the strategies that can be employed to assist and benefit school principals who encounter problems in their highly unionized school environments so that the running of their schools can be effective and efficient. Lastly, it sought to address the perceptions of teacher union members with regard to their own role in school management and how they can contribute meaningfully in order to promote the culture of learning and teaching (COLT) in schools.

A survey design , in which qualitative methodology was engaged to collect and analyze data , was utilized in the study. Responses were elicited by means of administering questionnaires to selected principals and personal semi – structured interviews to some union members. The document analysis was the third method that was used in order to enhance the credibility of the study. Responses in the questionnaires revealed that while some principals in this study recognize the existence and the role of teacher union members in their schools , there are those principals who are not comfortable with the teacher union involvement in their school management. Emanating from data gathered through the personal semi – structured interviews , teacher union members firmly believe they are deprived by principals from making their meaningful input that would assist in the effective running of schools. Such relationships suggest a lack of mutual trust between school principals and teacher union members in the areas of study.

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CHAPTER I : INTRODUCTION

1.1. INTRODUCTION

There is a belief that some school principals regard teacher unions as a source of anarchy and lawlessness in schools. Such beliefs , if confirmed a reality , might create school management as well as schooling problems that can further impact negatively on the culture of learning and teaching (COLT). Thus , the main purpose of this study was to elicit the perceptions of school principals with regard to the role of teacher unions in school management. This research project further sought to gather data from classroom - based teacher union members in terms of the role they , as union members , feel they need to play in the management of schools as well as in enhancing effective schooling.

The study aimed to provide insight into role perceptions by school principals and teacher union members as well as the impact their relationship might have on the school management as well as on effective schooling. The said picture might also create a premise for a strategic intervention for improving relations between school principals and union members , which might impact positively on teaching and learning in schools.

1.2 THE RESEARCH PROBLEM

One of the main goals of the South African education system today is the enhancement as well as the restoration of the culture of learning and teaching in schools. The culture of learning and teaching (COLT) is one vital component or responsibility entrusted with school principals as managers of schools to manage. It is , unfortunately , the very same component that heavily suffers

if there is no rapport between school principals and teacher union members within the school.

In order for schools to continue functioning as effective centres of learning and teaching , there is currently an urgent need for strategic management interventions to stem this cancerous growth of anarchy in schools highly believed to be caused by the lack of co-operation between teacher unions and school principals, particularly in KwaZulu - Natal rural schools. The professional attitude of teacher unions as well as the perspective of teaching as a profession , can also play an important role towards an effective school management (Heystek and Lethoko , 2001). It is important , therefore , to recognize the role that the teacher unions can play in the professionalism and motivation of teachers and that can bring about effective school management as well as effective schooling.

Various national and international educationists unanimously cite apartheid education system as one of the causes for the politicization of education particularly in African schools. The said system of education is further cited as a source of frustration and disappointment to a wide spectrum of both educators and learners some of whom opted to leave South Africa , either to join liberation movements or to further their academic studies in neighbouring countries and abroad. Politicization of education , thereafter , led to the formation of political organisations for both learners and educators aimed at fighting sexist and racial apartheid education system . These included the Congress of South African Students (COSAS) formed in 1979 and the National Teacher Unity Forum (NTUF) formed in 1988 by mostly Black teacher associations and a number of smaller

progressive teachers' unions (Sowetan, 21 May 1990).

My uninterrupted experience as a teacher for 26 years and currently as a Superintendent of Education Management (SEM) in the KwaZulu - Natal Department of Education , plus ongoing media reports , have led me to believe that in unionized school environments school principals' management decisions to a large extent , tend to be characterized by fear and inconsistencies . The said fear as well as inconsistencies in the principals' decision - making is believed , among others , to spring from intimidation and militant tactics strategically effected by some teacher unions particularly to law abiding and compliant school principals.

It is my further observation that a number of school principals end up not knowing whose word they have to honour between that of the teacher unions and that of the departmental officials. This state of mayhem in education becomes abundantly evident particularly when a departmental policy has to be implemented by the principals, especially those policies that might not be favoured by teacher unions at that point in time. This results in the creation of school management problems that might end up impacting negatively on effective running of the school. School principals , in particular , are the central focus to teacher unionism solely because they are perceived as an extension and the voice of the Department of Education (DoE) that allegedly impose some policies for implementation by schools without any consultation (Makobane , 1991 :1). School principals who consistently comply and implement such policies of the Department of Education , are usually destabilized and demoralized by teacher unions , thus causing their schools to be unmanageable and disorderly. Some school principals would , as a result of enormous union

pressure and intimidation , end up being deflated and frustrated and reluctantly succumb to various militant union tactics, in order to survive and enjoy the union's ' protection ' allegedly received by other ' defeated ' school principals in their daily school management functions. Teachers , in the same breathe , who work in close collaboration with their school principals towards effective school management and schooling are usually regarded as puppets by their union colleagues and would always be notorious for the co-operation they display. Hence , infiltration of teacher union politics into schools is cited as one of the reasons leading to high stress levels and frustration among a large number of school principals. These principals end up failing to freely and effectively execute their management duties according to the departmental stipulations for fear of victimization and harassment by teacher unions (Teleki , 1994:30).

Politicization of teachers and schools by teachers' unions is also cited as one of the reasons that is responsible for open defiance and challenging of the school principals' authority. Sit - ins within school business hours and unreported absenteeism from work , to mention a few , leave a number of school principals with management problems (Bot , 1992:14). It is also my further observation that some teacher union members end up utilizing their union affiliation as a shield and license to destabilize the schools' daily programmes , thus causing school management problems. The unpleasant and undesirable situation existing between school principals and teacher unions has , unfortunately , made some school principals to perceive teacher unions as destructive and non – co - operative and would find it difficult to work with them towards a sound and effective management and schooling , hence anarchy prevails. The core function of the teachers , which is to teach , as well as the core function of the school principals , which is to manage schools so that effective teaching and learning occurs , are as a result of the said destabilization obtaining within

the school , greatly disturbed. The introduction of the South African Constitution Act. No. 108 of 1996:23 as well as other relevant legislation in education , signaled the right of individual teachers to join teacher unions of their own choice. This has resulted in providing particularly school principals with a fresh challenge to explore and initiate democratic and constitutional ways when dealing with teacher unions towards effective school management and schooling.

Whilst it is of utmost importance to mention that union affiliation is the right of all teachers (Maile, 1999:3 ; Constitution of South Africa Act. No. 108 of 1996:3) , Heystek and Lethoko (2001) point out that unionism and professionalism are not regarded as partners. The same authors further argue that unionism is worker focussed whilst professionalism is learner oriented. There are teacher unions who regard themselves as professionals as well as those teacher unions who perceive themselves as representing teachers as workers or employees , thus fully supporting unionism. Unionism , with all its characteristics such as industrial action and collective bargaining , was incorporated in education thus creating school management hardships for the school principal (Heystek and Lethoko , 2001).

Another serious problem and concern is when unionized teachers seem to be alienated from their own schools as well as from the communities they serve as teachers. There are some communities that would even link unionized teachers with political organisations or rather look at individual teachers or a group of teachers as perpetuating the voice of a particular political organisation. Such

a situation is , in many instances , believed to be a cause of a number of management and schooling problems for the school principal , particularly when the school community demands an immediate removal of that particular unwanted teacher or that group of unwanted teachers from their own school. South African Democratic Teachers' Union (SADTU), for example , is said to be associated with the African National Congress (ANC) whilst the National African Teachers' Union (NATU) is allegedly linked with the Inkatha Freedom Party (IFP). This type of association is also cited as one of the reasons that militates against effective school management and schooling particularly when learners in classes are left without a teacher or teachers (Heystek and Lethoko, 2001).

In addition , NATU and SADTU , as two major rival teacher unions in KwaZulu - Natal , do not as expected , work in close collaboration and such negative relations believably impact negatively in the management of schools in a number of ways. The departmental officials would , for example , be called upon to lead a conciliation process over a dispute and rivalry taking place between SADTU and NATU members within the schools. The said rivalry surfaces particularly when there is a vacant promotion post within the school , where each teacher union representative in the interview panel would put pressure that his/her applicant- member gets the advertised post. In most cases , the said rivalry and dispute might end up implicating the school principal as he/she might be perceived to be siding with a particular teacher union. Such an unpleasant situation existing between two different teacher unions within schools , is believed to cause the school principal management hardships which further tend to have a negative bearing towards effective schooling as well. The study , therefore , is intended to benefit those school principals as well as

departmental officials who find it difficult to work jointly with teacher unions towards effective management of schools.

The study further aims to explore ways and means to bring the two said rival teacher unions in KZN together in an attempt to enhance sound management of schools as well as effective and meaningful schooling. Close relationships among the important stakeholders in the education of the learner , is cited as a cornerstone towards a healthy and effective school management and schooling (Sowetan , 21 May 1990).

1.3. PURPOSE OF THE STUDY

The study seeks to address the following key questions:

- How do school principals perceive the role and the involvement of teacher unions in the management of schools?
- How do school principals perceive their own management roles in a unionized school environment?
- What strategies can be employed to assist and benefit school principals currently facing problems in their unionized schools to work effectively with their unionized teachers?
- What are the perceptions of teacher union members regarding their role in school management and how they can contribute to decision- making aimed at promoting or enhancing the effective management of schools as well as COLT ?

1.4. FURTHER OUTLINE OF THE REPORT

Chapter 2 of the study will review relevant literature related to teacher unionism. Chapter 3 will

describe the research methodology and design of the study, as well as the data collection and analysis methods. Chapter 4 will focus on the findings of the study, while chapter 5 will analyze and discuss them. Chapter 5 will further conclude with implications of the study for policy and practice.

CHAPTER 2 : LITERATURE REVIEW

2.1. INTRODUCTION

The previous chapter outlined the negative impacts of unhealthy relationships currently obtaining in schools between teacher unions and school principals on the culture of learning and teaching (COLT) as well as on the effective running of schools. Chapter one concludes by giving an overview of rivalry between SADTU and NATU, as two major teacher unions in KwaZulu - Natal and how their rivalry negatively impacts on principals' school management as well as on effective schooling. The purpose of this chapter is to provide a review of the literature related to the role of teacher unions in school management.

Encroachments made by teacher unions on the authority and control of the school principal, as a manager of the school, make it difficult for effective management as well as effective schooling (Teleki, 1994 :8). Basson and Smith (1991: 604) agrees and points out that a school in which all teachers are trying to do the work of the school principal, does not attain its goals and objectives. According to Badenhorst (1987 : 52), control implies authority. If teachers do not submit to the authority and control of the principal, things will fall apart within the school, hence anarchy.

The essence of control, according to van der Westhuizen (1991 : 232), aims at achieving objectives which are in accordance with planned goals. In order to ensure that the educational activities get off the ground as planned, it is imperative that the school principal should be in control of the school without any interference of whatever nature (Stoner and Wankel, 1986:574). It is further imperative that teachers, including teacher union members, should be committed to their school work and also work harmoniously as a team in order to allow effective and efficient school management as well as

COLT (van der Westhuizen 1991:162).

Teacher unions , if correctly engaged , have a vital role to play in schools towards the sustainability and effective management of schools on the strength that teacher union members are professionally trained teachers themselves. It is , therefore , of cardinal importance that teacher unions and principals have to work in close collaboration without the principal losing his/her management grip of the school as an accountable official and the “ face ” of the DoE at school level. In the prevailing teacher unionism climate in schools between school principals and teacher unions , this study sought to address the following research questions, which the review of literature seeks to address:

- (i) How do principals perceive the role and the involvement of teacher unions in the management of schools?
- (ii) How do principals perceive their own management roles in a unionized school environment?
- (iii) What are the perceptions of teacher union members regarding their own role in school management and how they can contribute to decision – making aimed at promoting the effective management of schools as well as COLT?
- (iv) What strategies can be employed to assist and benefit principals currently facing problems in their unionized schools to work effectively with their unionized teachers?

2.2. The role and management functions of principals .

The principal has a number of management functions to perform . Thus , the expectations for what the principal is supposed to be knowing and doing in school management , are high (Kimbrough and Burket, 1992 : 303 – 339). Although the principal has to work in close

collaboration with the School Management Team (SMT) to effectively manage the school , it is however vital to emphasize that the principal remains answerable and accountable for all what happens within the school (Bolton , 1980 :7).

Eyre (1990) cited in Ndwedwe Newsletter (2001:13) takes it further and says the “ buck stops at the principal’s desk,” in terms of accountability and answerability to the Department of Education (DoE). It is , therefore , incumbent upon the school principal to ensure that the management of the school is in such a way that the school’s performance is in line with the goals or objectives set by the role players of the school (Mc Pherson , et al.,1986:81).

It is , however , unfortunate that if the school management is clouded with teacher unionism , the principal’s management functions as well as COLT will be crippled , hence educative teaching as a goal will not be achieved by that school (Basson and Smith , 1991:604).

It is amongst the roles of the school principal to motivate the teachers for their core function , which is to teach. This is in line with Maslow’s theory of human motivation which demonstrates that people stay within the organization and work for it in order to attain organizational goals because of motivation (Owen , 1987 :97). It is also of great importance for the principal to understand that people working together in any organization differ in terms of skills , capabilities and abilities (Bondensio and De Wilt , 1991 :295). In the light of this background , it is vital for the principal to motivate the school community , including the School Governing Body (SGB) , as well as teachers.

However the principal should also be self - motivated in order to be in a position to motivate other teachers (Teleki , 2001 : 62).

The principal might find it hard to motivate teachers if there is in turn, union interference within the school management and that might, in turn, impact negatively on his / her planning and organization .

One of the tasks of the principal is to ensure that the effectiveness of the school, in terms of teaching and learning, is improved. In order for him / her to promote effectiveness in COLT, the school principal has to design a healthy and sound communication system within the school.

According to Wood, et al. (1985 :105), communication within the school is very important as it allows the management process to get off the ground. A good communication structure ensures efficiency, effectiveness and cohesiveness within the organization (Wood, et al .1985:105).

Teacher unionism might, therefore, be a direct threat to sound communication and effectiveness within the school, putting effective management and the effective running of the school in jeopardy.

The creation and the maintenance of COLT and effective management that is free from any disturbance, is the role the principals have to play within schools (Kaiser, 1985 :60). Learners perform well if the school principal is accorded the opportunity to effectively manage the learning process, while a teacher creates a healthy classroom climate (Sayer, 1989: 61). Active teacher unionism with its industrial action can, therefore, create a barrier towards effective schooling and sound school management.

It is the role of the principal to ensure that there is enough educational equipment that is also optimally utilized within the school, and that will lead to high productivity (Basson and Smith, 1991:81). The principal is also expected to keep and record all the educational equipments and

teaching aids safely (Wild , 1980 : 406). It is , therefore , difficult for a principal from a unionized school environment to perform to the maximum where he is not accorded the opportunity to exercise control and that might end up leading to serious school management problems and ineffective running of the school.

The observance of contact time by teachers , is very important as the task of the principal in order to enhance COLT and effective school management. A number of unionized teachers lower educational standards in their schools by not honouring their contact time with their learners , citing union related reasons for their absence from school. Some unionized teachers would , for example , decide to remain in their staff rooms whilst they are supposed to be teaching learners in the classrooms (Molefe , 1993 : 6). This might be as a result of a number of misconceptions held by some teacher union members about union affiliation , which include that deliberate provocation of the school management by unionized teachers , represents true unionism. Such union related situations in schools , militate against the effective management by the principal as well as the effective running of the school as the principal finds it hard to set high educational standards if teachers do not adhere to their teaching time (Beach , 1985 : 207).

It is also the role of the principal to ensure that the professional tasks of all teachers within the school are effectively managed in order to realize the organizational outputs (Mc Pherson et al., 1986 :49). Bolton (1980 : 15) further points out that it is the role of the principal to ensure that the outputs of the school should be desirable and should be in line with the expectation of the community the school is serving. It is , however , unfortunate that a number of unionized teachers resist authority of the principals , and the said resistance by teacher unions makes the principals to fail to realize the desired output of the school (Blumberg and Greenfield , 1980 :244).

2.3. School management from a teacher union perspective.

It is a reality that teacher unions are here to stay (Maile , 1999 :3). This study is based on the premise and belief that should teacher unions be engaged in sound and constructive working relations with principals , teacher unions have a vital role to play towards sound management as well as effective running of schools. It is unfortunate that the tug-of-war currently taking place between the teacher unions and the principals in terms of the role teacher unions believe they can play towards effective schooling , impacts negatively on the main clientele, the learner.

Teacher unions believe principals do not recognize them and they further do not accord them , as unions , an opportunity to have an input towards the effective running of schools. Teacher unions further believe that the principals' sound management as well as the effective running of the schools , can successfully get off the ground if teacher unions are also perceived as equal partners with the principals in terms of problem solution and decision – making in schools.

SADTU and NATU, according to Heystek and Lethoko (2001: 227) , are aware of the lack of COLT in schools as well as the lack of professional ethos in teachers. SADTU , however , believes that if teachers' grievances can be met by principals , it is from that point that their members can be able to promote COLT and further be of assistance towards effective management of schools. This teacher union also believes that when negotiations with principals come to a deadlock , militancy can help them to achieve what they want. SADTU national leadership is reported to have said , “ the day our militancy stops , so will our existence. ” (Heystek and Lethoko , 2001: 227).

The following are some of the problems also cited by Heystek and Lethoko (2001: 223 – 226) in which teacher unions feel they can play a significant role towards their solution should they be actively involved towards the effective running of schools by principals:

- the safety situation for teachers and learners in schools.
- the qualifications and professional ethos of teachers.
- the salaries and lack of facilities in schools as well as the poor management by some school principals (Smith and Schalekamp , 1997 :4 , Hartshorne , 1992 :80).
- facilities in schools and proper functioning of the Department of Education (Heystek and Lethoko , 2001:226).

There are teacher unions who perceive principals as main obstacles in schools and who further look at them as standing in the way of well – structured teacher union programmes meant for the development of teachers in schools. Teacher unions also believe that there are currently problems in schools , as a result of some principals who have no management insight and who further do not want to actively engage their trained school – based stewards in the effective running of schools. Lategan (1990 :18) points out that some teacher unions would purposefully engage in a defiance campaign with the principals and further make the running of the schools difficult and ineffective , in order to make the principal recognize them , as unions , as important role players within the school.

In defence of union activities , teacher unions believe that their activities benefit the learner at the end of the day. SADTU and NATU , for example , point out that they would go on strike to get an approved as well as convenient teacher : pupil ratio that will be of help and of benefit to the learner

in class (Maile , 1999:11). Teacher unions further allege that they would also engage in an industrial action with an aim of putting pressure on DoE to timeously and expeditiously supply school textbooks , stationery as well as other physical resources that will enhance COLT in schools.

2.3.1. The Nature of Teacher Union Activities in Schools.

School principals are usually the main targets of teacher unions because they are perceived by unions as the puppets of the Department of Education (DoE) which is believed to impose its policies on their membership without any consultation. In order to make the management of the school difficult for principals , some teacher union members challenge and defy school authority in order to make the school unmanageable and disorderly.

According to Rossouw (1990: 7) , resistance to management occurs when the subordinates take a decision which is contradictory to the decision taken by the manager of the organization or when dissatisfied subordinates refuse to submit to control and authority of the officials within the organization. Resistance and defiance to school authority , is one of the weapons deliberately and strategically utilized by the militant teacher unions within schools to frustrate and infiltrate the management of the school. Such a situation has caused a number of industrious and dedicated principals to be deflated in terms of their school management functions (Makobane, 1991 :27). Resistance to management and authority of the principal , further militates against effective running of the school. The management of the school cannot , unfortunately , be effective if the group does not function as a whole (Allen , 1964:29).

A principal whose teachers are not committed to their school work and who also do not work harmoniously as a team, is unable to organize effectively within the school (Van der Westhuizen, 1991:162). The principal whose management and authority is further resisted by teacher unions, finds it extremely difficult to formulate objectives and to set educational standards (Lategan, 1990 :18). Such a principal will, therefore, find it hard to effectively manage the school and promote COLT, hence mayhem within the school will prevail.

Intimidation and militant tactics to principals believed to be loyal to the employer, are some of the strategies deliberately used by teacher unions to disorganize and resist the management of the school. Once the principal is intimidated, he/she cannot effectively plan his/her work (Teleki, 1994). “ Principals should make a choice between employees and employers. If they choose the latter, SADTU is going to start treating them as bosses – and is prepared to make life impossible for them. We will stage sit-ins in their offices and we are going to make sure that we remove those principals ” (Bot, 1992 :8).

Such a situation has caused a number of industrious and dedicated principals to lose their focus in terms of their management functions (Makobane, 1991:27). Scholtz (1990 :3) points out that some teacher unions would, as a strategy to derail the management of the school, completely refuse to submit their daily records of lesson preparation to the principal for checking. Badenhorst (1987 : 54) asserts that it is the responsibility of the teacher to ensure that the preparation of a lesson is done daily and be recorded in order to enable the principal to check and control it. According to Burket (1990 : 120), a principal who is accorded the opportunity to check and control teachers' recorded daily preparation, is able to plan the developmental programme of the teachers. Teleki (1994 : 54) concludes by pointing out that the principals' aim of checking

teachers' recorded daily preparation , is to maintain high educational standards ensuring a desired productivity. It is , therefore , a reality that without thorough daily lesson preparation from the side of the teacher , there can be no effective COLT in that school , and that might cripple the management as well as the effective running of the school.

Teacher unionism is closely linked with the notorious industrial action , militancy and chalk-down regarded by some role players in education as counter – productive to COLT , as well as on effective management of schools (Heystek and Lethoko , 2001: 224). Mayana (2001) also points out that teacher unions have too much interference on the education system , thus causing numerous problems that end up hindering the effective running of schools. According to Frase and Hetzel (1990 : 7) , a principal whose management is obstructed by activities of teacher unions , will have it hard to “ see to it that the organizational goals or objectives of the school are achieved. ” The principal from a school that does not perform its core function , which is to teach and learn , finds it extremely difficult to manage that school (Mc Pherson , et al. ,1986 : 82). According to Van Schalkwyk (1986 : 144) , the school cannot function both as a union and an educational institution at the same time. The following are cited by Bot (1992 :14) as common viewpoints against teacher unionism in schools:

... the interest of the learners are highly and untouchable. I , consequently ,have grave problems when we advance our own concern at the expense of children (Sonn, 1990).

*... teacher unions should fight the employer and not the main client.
(Interview with two (2) NATU officials, 1991)*

strikes are counter-productive as they go against the reason for teaching , which is the learner. (Interview with H. Ackermann, 1991)

In response to the reported teacher union activities taking place in schools further causing management hardships and lack of authority , the national management of SADTU had the following to say :

many teachers are organising under the name of SADTU , without SADTU actually having control (Bot , 1992 :8).

... those undisciplined teachers must stop their actions because they are damaging the image of SADTU and also scaring off potential members (Bot , 1992 : 14).

It is , however , unfortunate that the reported negative scenarios by teacher unions taking place in schools , bring about anarchy and unpleasantness in schools and further cause management problems to principals as well as to effective running of schools. Sanger in describing the impact of teacher unions in school management as well as on effective schooling wrote , “ the union has arrived , education arena will never be the same again ” (Sanger , 1990 : 35).

It is my observation that the ideologies of teacher unions with a huge membership of black teachers , differ from that of white members. There is a conflict between ‘ militant ’ and ‘ professional ’ perspectives (Hyslop , 1986 : 91). Teacher unions mostly dominated by white members , do not believe in militancy when expressing their frustrations to the employer. They do engage in industrial action just like other unions , but it is however remarkable that they do not

engage in union activities that would seriously disadvantage their learners. White dominated teacher unions would , for example , stage their picketing or marches either very early in the morning before schools start or after lunch after having taught their learners and giving them some work to do while their teachers are away from school.

On the other hand , it is my further observation that teacher unions with a huge black membership, also express their frustrations and indignation with the employer and that is their union right. It is , however , noted that their *modus operandi* greatly differs from that of their white counterparts. Learners from predominantly black schools , would on the day of the strike or any union activity , go to schools as usual only to find that there is not even a single teacher in some of the schools , and to those schools where there are few teachers , there would be no effective learning and teaching taking place. This is no demonstration that predominantly white teacher unions are better than teacher unions with a huge black membership. It is , however , a matter of serious thought and discussion in the Education Labour Relations Council (ELRC) – KZN , particularly if our black teacher unions are still committed to effective running of schools as well as excellence in education.

2.3.2. The role and influence of teacher unionism in schools.

The history of teacher organizations in South Africa is a sad testimony of the legacy of apartheid in education. Teacher unionism in this country dates back to prior to the 1900's with quite a number of unions operating largely along language and provincial lines (Heystek and Lethoko, 2001 : 223). It was through the establishment of the National Teachers' Unity Forum (NTUF) by the end of 1989 that the talks of a single , non-sexist and democratic teachers' union , were formalized. The seven rounds of unity talks among teacher associations and a number of smaller progressive teachers'

unions , culminated towards the historic formation and launch of the South African Democratic Teachers' Union (SADTU) on 6 October 1990 to 1500 delegates. The newly formed teacher union was described by Moll (1991: 201) as ‘ the most non- racial and representative teachers’ organization in the history of the country.’

Notwithstanding the momentous importance of the launch and foundation of SADTU , the tension regarding the form and function of the new union had not been laid to rest as a result of its link with the political agenda. The association of SADTU with some political organizations , led to the alternative attempts to bring teachers together other than following the SADTU route.

The National African Professional Teachers’ Organization of South Africa (NAPTOSA) , believed to be more a professionally orientated alternative to SADTU , was founded on 24 August 1991 (Education News , 1995 : 105). The new NAPTOSA was formed on federal basis , comprising 10 white and three African teacher associates.

2.4. Strategies to assist and benefit principals from unionized school environments.

In order to benefit those principals who are unable to work with teacher unions , it is vital for them to understand that teacher union affiliation is the constitutional right of all teachers (Maile, 1999:3 ; Constitution of South Africa , Act. No. 108 of 1996) and that teacher unionism is ‘ here to stay ’ (Maile , 1999 : 3). One suggestion and a possible solution that might bring teacher unions and principals even closer to one another towards sound school management and effective running of schools , would be a development towards professional unionism. Kercher and Cauffman (1995 : 111) refer to professional unionism as when teacher unions and school management work together without any “ they versus us ” , but to whatever is done between teacher unions and principals ,

team work should be the norm. Professional unionism does not suggest any relaxation of the management grip on the part of the principal at the hands of the teacher unions , but what it means is to work together as a team towards the attainment of a single goal , which is educative teaching (Heystek and Lethoko , 2001: 227).

According to Van der Westhuizen (1988 : 380) , there should be a compulsory in- service training policy which will enhance management development of principals. In United States of America (USA), for example , the development of principals is a high priority. The USA makes use of assessment centers and universities to develop management skills of principals. The same author suggests that South Africa follows the same programme with its principals , particularly the new principals whom he suggests should receive a top priority in terms of management development programme of the DoE. The suggested intensive management developmental programme can be of help to our South African principals in terms of dealing effectively with teacher unions.

Wilson (1975 : 200) advises principals that teachers support something that they have helped to put together, especially if a plan or a decision affects them. According to the said author , involving all teachers in the planning process as well as in the decision – making , may result in teachers helping the principal towards effective school management as well as effective COLT. The controlled involvement of teacher unions in the programmes of the school might help the principal in minimizing teacher union interference within the school.

2.5. Conclusion

The principal , as already stated in this chapter , is a key person as well as the determining factor towards effective school management as well as the effective running of the school (Teleki ,

2001: 82). It is in this light that school management should be characterized by tranquility and support from the teachers and other role players and be spared from teacher union activities that end up having derailed principals' focus from his/her school management and COLT programmes.

The principal, vital as he/she might be in the school management as well as in effective running of the school, cannot single handedly manage the school without the unending assistance and support of all teachers within the school. The interference of teacher unions in the management of the school can, therefore, impact negatively on COLT as well on effective school management as it militates against the team spirit. Unless strategies are identified, developed and implemented to address the above, effort to address COLT will remain futile.

Teleki (2001 : 82) concludes by reminding unionized teachers who interfere with the principals' management, that they ' cannot be teachers and be school principals at the same time.' Thus, this study aimed to investigate the perceptions of the principals regarding the role of teacher unions in the management of schools. The study further seeks to gather the perceptions of the teacher unions in terms of their own role in school management. The study utilized a survey design among school principals and teacher union members to solicit their perceptions regarding the role of teacher unions in school management.

The purpose of the next chapter is to describe the research design and methodology utilized in the study.

CHAPTER 3 : RESEARCH METHODOLOGY

3.1. INTRODUCTION

The aim of this study is to examine the principals' perceptions of the role of teacher unions in school management. The experiences as well as opinions of principals and selected teacher union members from Ndwedwe and Maphumulo circuits within iLembe District : eThekweni Region , were examined.

Ndwedwe is a rural area situated North of Verulam, at almost 67 kilometres from Durban , whilst Maphumulo also rural , is situated towards the North of Stanger , at about 120 kilometres from Durban.

The study also aims to provide a certain level of insight into the prevailing management of unionized schools as well as the perceived roles of principals and teacher unions in the management of schools. The study further seeks to examine ways and means principals and teacher unions can work in close collaboration as vital role players in education , thus ensuring effective school management and schooling. The following questions formed the foci of the study :

- (a) How do principals perceive the role and the involvement of teacher unions in school management?
- (b) How do principals perceive their own management roles in a unionized school environment?
- (c) What strategies can be employed to assist and benefit principals currently facing problems in their unionized schools to work effectively with their unionised schools.
- (d) What are the perceptions of teacher union members regarding their role in school management and how they can contribute to decision – making aimed at promoting or enhancing effective management of schools as well as COLT?

This chapter focuses on the research methodology and design , as well as data collection and analysis methods. The limitations of the study will also be described.

3.2. RESEARCH DESIGN AND METHODOLOGY

The study utilised a survey design , in which qualitative methodology was engaged to collect and analyze data . The choice of the survey approach was informed by Cohen and Manion (1994) who assert that surveys are useful for gathering data aimed at describing the nature of existing conditions. A qualitative approach looks at the world as essentially different from the physical world. There is no one social reality , but varying interpretations held by individuals and groups. In qualitative approach , the researcher moves freely back and forth between data collection and theoretical analysis. This back and forth process may continue for a long time , until the researchers are satisfied that , they have examined enough data to determine that the theory is accurate (Mark , 1996) as cited in Mkhize (1999 : 25).

After a close review at a range of possible research methods , it was decided that self – completion questionnaires as well as personal semi – structured interviews be used as appropriate research tools to elicit the opinions and perceptions of the key constituents. Questionnaires have been opted for mainly because a questionnaire is the most economical available instrument for obtaining information from a sample of widely spread sources in order to learn about the distribution of characteristics , attitudes or beliefs (Behr , 1983 ; Herbert and Herbert , 1990). In addition , interviews with 20 post level one teacher union members were also conducted. Judd *et al.* (1991 : 218) , as an advantage of the personal interviews , state that the researcher is able to notice and correct the respondents' misunderstandings , to probe inadequate or vague responses , and to answer questions and allay concerns , and thus , is able to obtain complete and meaningful data.

Survey data is typically collected through questionnaires or interviews or , as is the case with this study , a combination of the two (Nunan , 1992). In combining the two research methods , the researcher is able to maximise the advantages and offset the limitations of each. According to Cohen and Manion (1994 : 208)

and Selliger and Shohamy (1990 : 105) triangulation , that is , “ two or more methods of data collection in the study of some aspect of human behaviour ” , is one means of verifying and securing greater reliability of results. In order to ensure reliability, the use of a questionnaire was adopted by a researcher as a means of gathering data of factual nature and the interviews as a means of verifying the findings. The aim of combining two research methods , according to Stake (1988) is to transcend individualistic analysis and also to attempt to penetrate what he terms the multi - layered complexity of reality within a bounded context.

The third method used in the study was the document analysis. The following documents were analysed and the analysis informed the construction and the development of the questionnaire distributed to principals :

- (i) Constitutions of NATU and SADTU.
- (ii) Codes of conduct for NATU and SADTU.
- (iii) Education Law and Policy Handbook.
- (iv) ELRC KZN : Agreements.
- (v) South African Schools’ Act. No. 84 of 1996 (SASA).

The researcher , in addition , felt the utilisation of the three types of data collection would both assist with the interpretation and further enhance credibility of the study. The data gathering methods include :

3.2.1. The questionnaire

The major tool used in the study was the self – completion questionnaire distributed to selected principals from Ndwedwe and Maphumulo circuits after permission to administer the questionnaire in the two selected research areas had been granted by the Regional Senior Manager (RSM) : eThekweni Region : Department of Education (DoE). (See Appendix G and H). Letters of request to conduct the research were further sent to both circuit managers for the research areas. (See Appendix B and C). The questionnaire also

guaranteed confidentiality as well as anonymity so that the respondents could be honest and be original in their written responses. (See Appendix A). This is in line with Henderson *et al.* (1987) as cited in Mkhize (1999 : 29) , who point out the importance of questionnaires :

They permit anonymity. If you arrange so that their responses are given anonymously, You will increase chances of receiving responses that genuinely represent a person , beliefs or feelings.

In order to ensure quality as well as the identification of ambiguity and redundancy , a pilot study was conducted with ten principals from Kwa Mashu circuit , selected through availability and convenience sampling method. In line with Cohen and Manion (1994) , participants in the pilot study and the sample for the final study were selected from the same target population. Modifications were , where necessary , also effected by the researcher to facilitate simplicity of the questions basing on the comments and recommendations of the respondents.

According to Bell (1993) as well as Fink and Kosecoff (1985) , piloting of a questionnaire is of utmost importance in determining whether respondents will understand directions provided and also in determining the amount of time it will take to fill a questionnaire. Through the help of my colleagues from both research areas , 60 questionnaires were randomly distributed to 60 principals. The questionnaires distributed were clear and straight forward with simple instructions as well as clearly phrased open – ended questions which neither ‘ presumed ’ any viewpoint nor ‘ led ’ to any desired response (Hite , 1993 : Bell , 1999). An extension of time to respondents was given , realising that expected questionnaires were not coming in as per deadline stipulation in a covering letter attached to all questionnaires.

In section A and B of the questionnaire , respondents were urged to supply the researcher with the demographical as well as the biographical information , including race and gender from question one to 11.

Section C of the questionnaire comprised of question 12 to 28 representative of the following :

- (a) The perceptions of principals regarding the role and the involvement of teacher unions in school management.
- (b) The principals' perceptions with regard to their roles in the management of schools.
- (c) Suggested strategies that can be employed to assist and benefit principals currently facing problems in their unionized schools in working with teacher unions towards sound school management and effective schooling.
- (d) The perceptions of teacher union members regarding their role in school management and how they can contribute to decision – making aimed at promoting or enhancing effective school management as well as COLT.

44 out of 60 questionnaires were returned (73,3 %). The researcher deliberately distributed 10 more questionnaires over and above the targeted figure which was 50 questionnaires , considering that some respondents would for various reasons , fail to return questionnaires distributed to them.

3.2.2. The interviews

Data from the questionnaires received from the respondents was analyzed. The data analysis , in turn , informed the nature and the format of the semi – structured interviews with post level one school – based union teachers from both NATU and SADTU in Maphumulo and Ndwedwe circuits. Under the auspices of

NATU and SADTU regional and branch union officials , 10 union – selected post level one teachers per teacher union , were interviewed after written submissions were made to selected principals and teacher unions. (See Appendix E and F). The researcher further ensured that confidentiality was highly observed during interviews. The interview data was analyzed and organised into themes. The researcher opted for the semi – structured interviews because they allow the development of a close rapport as well as a sense of trust with the respondent (Stangor , 1998 : 98).

Each interview was scheduled to be 30 minutes in duration , but where necessary , respondents were accorded the flexibility of reasonably more time to round up their interview responses. Each respondent was asked the same 10 questions during the interview. (See Appendix D). The researcher , before the commencement of the interview , undertook to use the information gathered from the respondents solely for the purpose of the study.

All interviewees were audio- taped and transcribed. During the process of interviews , the researcher noted down the responses of the respondents. In addition , Henderson , *et al.* (1987) , cited in (Mkhize , 1999 : 31) point out:

Most people find that note taking is not really disruptive. A good thing to do is to take down only key phases and features of the respondents' answers while you are conducting the interview. Then immediately after the respondent has left , write out the full answers as close to the person , words as you can reconstruct.

3.3. LIMITATIONS OF THE STUDY

Administering the data collection instruments , was not without problems. It took , for example , the

DoE : eThekweni Region , almost three full weeks to respond to my letter of request to conduct a study in schools under its jurisdiction. The reason for the delay was most probably caused by the fact that the whole Province of KwaZulu – Natal , was focussed on the restructuring process whose time frame was tight. The understood and expected delay on the part of the DoE , however , caused some delays in distributing the questionnaires to principals.

The locality of some of the schools in both selected circuits , made it extremely difficult for some principals to access the circuit offices for questionnaire submissions particularly on inclement weathers. This is one of the factors that contributed a great deal towards the dragging submissions of the questionnaires distributed to principals. The late submissions of the questionnaires further caused a delay in terms of developing interview questions for post level one school – based teachers for both major teacher unions in KwaZulu – Natal (KZN) , NATU and SADTU.

Limitations to the study also included the small sample of 44 principals and classroom – based teacher union members totalling to 20. Whilst the restriction might have caused an impact on the generalisability of the research findings and range of recommendations , it would definitely not invalidate it in its entirety particularly that the nature of the study is intentionally a small – scale in design.

Lastly , any parallels with regard to the principals’ perceptions of the role of teacher unions in school management in urban contexts , cannot be inferred as the study is specifically confined to a rural setting.

The intention of the next chapter is essentially to present and interpret the data obtained through self – completion questionnaires from the principals as well as semi – structured interviewees from the few union – selected school – based post level one teachers from both research circuits : Maphumulo and Ndwedwe.

CHAPTER 4 : RESEARCH FINDINGS

4.1. Introduction

The main purpose of the study was to elicit the perceptions of principals with regard to the role of teacher unions in school management. The study further sought to gather data from recognized teacher unions in terms of the role they , as union members , believe they can play in school management as well as in effecting the smooth running of schools. The study utilized a survey research design in which the perceptions and the opinions of principals as well as selected teacher union members from both major teacher unions in KwaZulu – Natal (KZN) , NATU and SADTU , were sought through the media of self – completion questionnaires as well as personal semi – structured interviews respectively. The aim of the questionnaire as a main research tool for the study , was to elicit the perceptions as well as the opinions of the principals with regard to the role of teacher unions in school management. The main aim of the interviews with teacher unions , mainly NATU and SADTU school – based members , was to establish their perceptions in terms of the role they , as unions , believe they can play in school management and how they can further contribute to decision – making aimed at promoting or enhancing the smooth running of schools. Findings from the study will be used to structure a framework that may help principals to strategically manage teacher unionism in their schools.

The purpose of this chapter is to analyze and interpret the data collected from the self – completion questionnaire , completed by selected principals and the semi – structured interviews conducted with selected teacher union members from NATU and SADTU.

4.2. Respondents' Profile

4.2.1. The Principals

The sample for the study consisted of 44 (N = 44) principals from Maphumulo and Ndwedwe circuits : iLembe District , in KwaZulu – Natal (KZN). Of these , five percent were of Indian

descent while 95 percent were Africans all teaching in rural schools . Of the 44 principals , 30 were females while 14 were males. 27 were from primary schools while 17 were from secondary schools. In terms of their experience as principals , 34 percent had been in their posts for 0 - 5 years , 44 percent between 6 – 10 years , 11 percent between 11- 20 years , and 11 percent between 20 years and above. Nine percent had qualifications below M+3 while 11 percent had M+3 qualifications , 43 percent had M+4 qualifications , and 37 percent had M+5 qualifications.

In terms of their qualifications , four principals (nine percent) were under – qualified , that is , they held matriculation and under three years training in their professional qualifications (below M+3). Chapter three of the **Personnel Administration Measures** (PAM) document , paragraph 2 (2) , states that all teachers must have a minimum of three years professional qualification after matriculation , that is , a Relative Education Qualification Value 13 (REQV13) or an M+3 qualification, in order to qualify for a principalship appointment. The National Department of Education (NDoE) , as an employer , firmly believes that once a teacher has the above mentioned professional qualification plus a minimum experience of seven continuous years as a teacher , the incumbent would fit as a principal , particularly after the implementation of a comprehensive departmental induction programme. Five principals (11 percent) who completed the questionnaire , had a minimum qualification of a matriculation and a three year professional qualification (REQV13) or an M+3 qualification. This represents a slight improvement of one school principal (two percent) , if this is compared with the number of under - qualified principals in the province. Nineteen principals (43 percent) had matriculation as well as four years in their professional qualifications (REQV 14) or an M+ 4 qualification. This figure demonstrates a significant improvement which indicates that some principals in schools do upgrade their professional qualifications. This may help in the effective and sound management in their schools. 14 principals (32 percent) had improved their qualifications from REQV 13 to REQV 14.

Furthermore , the chronological age of the principals ranged from 20 – 65 years of age. Of these , 19 (43 percent) were between the ages of 36 – 45 years. It is also noticeable that younger principals of 20 – 25 years of age (five percent) , constituted a minority when compared to other age groups. The 46 – 55 years age category comprised of 30 percent , whilst the 56 - 65 years age category was represented by eight percent in terms of the actual figures attached to them.

The majority of the principals (44 percent) had 6 – 10 years as principals. There was a sharp decline to eleven (11 percent) in each of the following categories , that is , the 11 – 20 years as well as the 20 years and above age categories. The possible reason behind the rapid decrease in percentages in the above mentioned categories , might be that most of the principals who are either granted medical boarding or an early retirement status are from the 11 – 20 years as well as the 20 years and above categories.

4.2.2. Teacher Union Members

Union interviewees consisted of 20 (N=20) NATU and SADTU members of African descent from Maphumulo and Ndwedwe circuits : iLembe District (KZN). Of the 20 union members , 10 (50%) were NATU members while the remaining 10 (50%) were SADTU members. 15 (75%) of them were females while five (25%) were males. 8 (40%) were from secondary schools while 12 (60%) were from primary schools. Their chronological ages ranged between 26 – 65 years . Of these , five (25%) were between 26 – 35 years , six (30%) between 36 – 45 years , seven (35%) between 46 – 55 years while two (10%) were between 56 – 65 years. It was noticeable that the majority of teacher union members interviewed , were between 46 – 55 years while the minority were between 56 – 65 years.

In terms of their professional qualifications , 15 (75%) interviewees had M+3 while five (25%) had M+4. It was also noticeable that the majority of union members with M+3 qualifications , were in the 26 – 35 as well as 36 – 45 age brackets.

4.3. Principals' Perceptions of Roles

4.3.1. Perceptions of the role of teacher unions in school management

Firstly , in response to the research question , how principals perceive the role and the involvement of teacher unions in school management , 64 percent who completed the questionnaire **agreed** with the statement that teacher unions have a role to play towards effective professional development of teachers. 27 percent of the respondents **disagreed** with the above statement while nine percent were **uncertain** .

This is indicative that some principals from the research areas do recognize the need to involve teacher unions in the management of the school , through their active involvement in various DoE initiatives and committees , both provincially and nationally. This is based on the fact that union members are given the necessary skills and expertise in terms of their own professional development in schools. The provincial advocacy campaign for Outcomes Based Education (OBE) , for example , actively involved teacher unions in the workshops that were conducted for departmental officials as well as teachers and vigorous training sessions were organised by the DoE. This type of exposure to such departmental initiatives and committees , equip teacher union members with a lot of information and presentation skills that help them to train their school – based members. The above respondents might have come to recognize this reality and to accept the existence and rights of union members in the schools.

Secondly , most of the respondents (56 percent) **disagreed** with the statement that union site stewards in schools should be invited before management decisions are taken by principals , while 44 percent **agreed** . Based on my practical experience in working with schools as the Superintendent of Education Management (SEM) , a number of school – based disputes reported by principals to the DoE , are between the union site stewards and the school management teams (SMTs). For example , in one academic year , almost 70 percent of the reports would involve a direct challenge of

the management decisions allegedly made without an active involvement of the site stewards. Principals usually defend their stance by saying that they are reluctant to invite teacher unions in their management decisions because unions do not have the love and the interest of the child at heart and that teacher unions are destructive to school programmes. Such unhealthy relations as well as that tug-of-war between principals and teacher unions, unfortunately, end up impacting negatively on the work within schools.

Thirdly, 59 percent of the respondents **disagreed** with the statement that teacher unions contribute meaningfully towards effecting discipline amongst their own union members, whilst 41 percent of the respondents **agreed**. In my experience as a departmental official, it has been my continuous observation that some teacher unions are highly concerned with the sustenance of their membership figures rather than educating their members on how to avoid the re-occurrence of disciplinary problems committed by their members in schools and disturbing the smooth running of the schools. This trend by teacher unions has, consequently, led to some teachers perceiving teacher unions as a shield from disciplinary action for defiance and insubordination to school authority.

Fourthly, 51 percent of the principals **agreed** with the statement that teacher unions have a role to play in promoting professional ethics in the schools while 20 percent **disagreed**, 24 percent of the respondents were **uncertain** with regard to the above statement and five percent were **average**. Such unexpected response (51 percent) is indicative that there are principals who put union interests first in their running of schools at the expense of COLT. This is on the basis that unionism and professionalism are two different entities with conflicting interests. It is further unthinkable that union members can promote professional ethics at the expense of unionism. It is my belief that amongst the above mentioned 51 percent of principals who **agreed** with the statement, are mainly those principals who are also active union members. It is common knowledge that principals, just like all school-based and office-based teachers, are employed in terms of the Employment of

Educators Act. No. 76 of 1998 (EEA) and are , therefore , entitled to union affiliation. It is , however , a recipe for anarchy for a principal to sacrifice his / her core functions , as a manager , at the hands of unionism. In my experience working with schools, a principal who is a union member tends to have difficulty in balancing union activity and school management , resulting in ineffective running of the school. To this effect , 67 percent of the principals who filled in the questionnaire, **disagreed** with the statement that a principal who regularly attended union – related meetings / gatherings during school hours , was likely to bring more information and skills to teachers while 33 percent **agreed** . The above responses reflected that the majority of the respondents were not in favour of principals who mixed unionism with their core functions as school managers. According to Hystek and Lethoko (2001: 222) , teacher professionalism and unionism are not regarded as partners. Thus , the involvement of principals in unionism might be problematic for the effective management of schools.

Fifthly , 60 percent of the principals **disagreed** with the statement that teacher unionism has a positive influence on maintaining harmonious working relations between the management and the teachers while 29 percent **agreed** and 11 percent were **uncertain**. In relation to this , four (nine percent) respondents commented that union related problems usually start when there is more than one teacher union within the same school , boldly mentioning NATU and SADTU as two major rival teacher unions in KZN. Further comments made included the fact that the show of power between these teacher unions usually surfaces when there is a vacant promotion post within the same school. Each union tends to fight for the employment of their own members at the expense of what would be good for the school. The result is that harmonious and positive working relations between the management and teachers are affected.

The above results suggest that principals from the schools in this study do recognize the existence as well as the role teacher unions can play towards effective teaching and learning. Teacher unions are perceived by the principals as knowledgeable as a result of their active involvement in DoE initiatives and committees. The findings , however , confirm that principals who filled in the questionnaire ,

were not comfortable with the involvement and participation of teacher unions in the running of schools. This further reflects a sense of distrust and tension obtaining between principals and teacher unions which, unfortunately, can affect the smooth management of schools as well as effective development and sustenance of the culture of learning and teaching (COLT).

4.3.2 Principals' perceptions of their management roles in a unionized school environment .

In relation to the principals' perceptions of their management roles in a unionized school environment, firstly, most of the principals (63 percent) **disagreed** with the statement that the principals' style of management should accommodate the beliefs and convictions of the majority teacher union members within the school, whilst the remaining 37 percent agreed. In my experience both as a principal as well as a Superintendent of Education Management (SEM), once the management of the principal is dominated by the views of a particular teacher union that appears to be in the majority within the school, that will be a recipe for enormous management problems within the school. Such a situation might also create a source of division among teachers into union camps and will be a fertile ground for anarchy within that particular school.

Secondly, 30 percent of the respondents **agreed** with the view that effective involvement of teacher unions promotes sound communication within the school, while the remaining 70 percent **disagreed**. Such a response indicates that most of the principals who completed the questionnaire do not recognize a positive change that teacher unions can make in effecting sound communication in schools. An unexpected number of respondents (65 percent) **agreed** that principals should be equal partners with teacher unions towards effecting the culture of learning and teaching (COLT), while 35 percent of the principals **disagreed**. It is, however, possible that the phrase 'equal partners' might have confused some respondents in meaning 'to work together', yet it meant more than that. The phrase actually meant there is absolutely no management decision that the principal would make

without the knowledge and active involvement of the union site stewards. Another possibility that might have led to the said unexpected response of 65 percent from the principals, is that some might have 'worn their union hats' and not the 'management hats' when responding to this question. The involvement of teacher unions as **equal partners** in the running of schools, undoubtedly, poses a number of problems towards the effective and smooth running of schools especially that professionalism and unionism are not seen as partners (Heystek and Lethoko, 2001: 224). Van Schalkwyk (1986: 144) takes it further when saying the school cannot function both as a union and an educational institution at the same time. It is rather unfortunate that it is the principal who remains with accountability and answerability as the head of the school as well as the 'ambassador' of the DoE (Bolton, 1980: 7).

Even though principals are also entitled to join teacher unions of their own choice in terms of the relevant clause of the Employment of Educators Act, No.76 of 1998, it however becomes a problem if a principal's style of management accommodates beliefs and convictions of his/her own union. In my interaction with schools as SEM, it is my observation that there are principals who uphold their own union ideologies in their management of schools, thus causing unnecessary animosity as well as tension particularly amongst their own teachers who might belong to other teacher unions. The said negative atmosphere between the principal and some disgruntled union teachers within the school might end up serving, in most instances, as a source of division amongst teachers as well as an obstacle towards the effective running of the school. It should, however, be remembered that principals are answerable and accountable to the DoE as well as to the parent community. Eyre (1990) cited in Ndwedwe District Newsletter (2001:13) puts it clearly when he states that, "the buck stops at the principal's desk." It is, therefore, in the light of the above circumstances, a serious problem for principals to mix professional duties with unionism in the running of their schools (Heystek and Lethoko, 2001: 224).

Thirdly, 93 percent of the principals **disagreed** with the view that industrial action by teacher unions during school hours actually benefits the learners eventually, while seven percent **agreed**. The above response is an indication that a number of principals are highly concerned about the loss of contact time through industrial action by teacher unions. One of the core functions of the principal is to manage the culture of learning and teaching (COLT) within the school. If teachers are involved in industrial action during teaching time, obviously, this is greatly compromised.

Fourthly, most of the respondents (45 percent) indicated that they prefer to approach their school management teams (SMTs), in an event of a disciplinary problem within their schools, and 29 percent prefer approaching their Superintendents of Education Management (SEM's). A small number of respondents (two percent) preferred approaching their unions, while four percent opted for their School Governing Bodies (SGB's). The remaining 20 percent of the respondents preferred to seek assistance from their principal colleagues should there be a disciplinary problem within their schools. The high percentage of preference received by the SMTs, indicates that there is still a high rate of working trust between the principals and their SMTs. This suggests that if SMTs are union inclined in their management operations, there can be no effective running of schools. Another impression the researcher gathered in terms of the responses given in this question, is that principals prefer working in close collaboration with the structures of the DoE rather than working with the teacher unions for a management advice affecting their schools. This might be caused by the negative media reports about the union activities as well as principals' reports of actual destructive incidents made by some militant and radical teacher union members, thus leading to some of the schools unmanageable.

Fifthly, an overwhelming number of respondents (93 percent) were not in favour of principals who promoted and protected the interests and policies of their own teacher unions in their style of management, while the remaining seven percent were in favour. My experience as an SEM as well

as a principal has confirmed that a principal who, in his/her school management, promotes the interests and policies of his/her own teacher union, creates unpleasantness and discomfort for other teachers who might belong to other teacher unions. In addition, such a situation is a recipe for anarchy within the school and it further perpetuates divisions among teachers according to their union affiliation.

On the other hand, most of the respondents (58 percent) **agreed** with the statement that teacher unions are a source of reliable information to school principals, while 39 percent **disagreed**. Three percent were **uncertain**. It is possible that most of the respondents who **agreed**, based their responses on the fact that recognized teacher unions, as role players in education, have a quicker mechanism of distributing updated information to their members as agreed upon in the Education Labour Relations Chamber (ELRC) : KZN, even before the principals receive the same information from their departmental officials. It is, therefore, in the light of the reason stated, that teacher unions are perceived by a number of principals as having reliable information. In this regard, teacher unions are advantaged because they are represented in the ELRC : KZN when educational issues are discussed by the DoE officials.

Lastly, 60 percent of the principals who completed the questionnaire **disagreed** with the view that teacher unionism contributes positively towards the achievement of the desired outcomes in schools while 36 percent of the principals **agreed**, and four percent were **uncertain**. This indicates that principals in the study do not believe that teacher unions have a significant role to play towards the effective running of schools. Based on the figures reflected above, there are also clear indications that principals and teacher unions from the research areas, are still far from working in close collaboration towards the effective running of schools. Furthermore, there is a certain level of tension that appears to be obtaining between principals and teacher unions that might end up disturbing the smooth running of schools.

4.4. Union Members' Perceptions of their Role in School Management

Firstly , union interviewees were asked to comment on the statement : Union site stewards should be invited by the school management before any management decisions are made. Compared to 80 percent (16) of the union members who **agreed** , 20 percent (four) **disagreed**. Out of 20 union members interviewed , three members felt that they were looked down upon and also marginalized by their principals when only the principals and their management teams take management decisions on behalf of their members without inviting them in the convened management meetings. Union members interviewed felt that if union site stewards are involved in school management meetings , their role can be significant to the management of the school.

Secondly , respondents were asked to comment on the role of teacher unions in bringing about unity and harmony within the school. In response , all union interviewees (100 percent) **agreed** with the above statement. Two union members even stated that their teacher union , during union meetings , emphasize to all members that they should promote unity amongst teachers in schools. One interviewee further declared :

*... and any union member who has been reported to the union
for causing trouble at school can even be expelled from our union.*

Thirdly , respondents were asked to comment on whether teacher union members should be allowed to participate in industrial action during school hours since the results achieved , thereafter , benefit the child in class. 50 percent of the interviewees **agreed** with the statement while the remaining 50 percent **disagreed**. The 50 percent who agreed were concerned about leaving learners unattended to while teachers were away from the school. The remaining half (50 percent) believed this was the best way to pressurize the Department of Education (DoE) : KZN to expedite the delivery of various resources in schools that make schools successful and run effectively. One union member

even stated :

We know how to put pressure on the DoE in order to make it hasten the delivery of textbooks and stationery for effective teaching and learning , and it is mainly the child as well as the principal that benefit from our victory , as a union.

The said union interviewee further stated that educational interventions of teacher unions , are indicative of the supportive role of teacher unions to the principals towards the effective running of schools.

Fourthly , the union members in the study were asked to comment on whether school principals should work closely with teacher unions as equal partners in management for effective teaching and learning . 70 percent of the union respondents **disagreed** while 30 percent **agreed**. The unexpected majority of the respondents who were not in support of the above , strongly pointed out that it was very important for the principals and teacher unions to work in close collaboration for effective running of schools , but **not** as equal partners. This figure was unexpected because teacher unions always complain that principals do not treat them as equal partners in schools. For example , in one of the schools in the study , lessons were brought to a halt for two full days when teacher union members attacked the principal as well as his SMTs citing the reason that the principal does not treat them as equals in the running of the school. However , one union respondent declared :

... and it is the principal who heads the school and he is the one who has to account to the DoE and to parents should anything go wrong in the school and not us !

It also surfaced from this study that younger union members mainly of the age groups 26 – 35 as well as 36 – 45 years of age in both sexes , demanded to be regarded as **equal** partners with principals in terms of decision – making and they further believed that the matter should be non – negotiable. They also voiced their concern about the partial recognition they receive from the

principals particularly when there is a management crisis within the school when they had never been part of any management decision from the onset.

Fifthly , union respondents were asked to comment on the statement : Attending union related meetings / gatherings during school hours should be encouraged by principals since schools benefit from the information gathered from such meeting / gatherings. 55 percent of the union interviewees **disagreed** with the above statement while (45 percent) **agreed**. 55 percent of the respondents were against holding union related meetings / gatherings especially during school hours , as that would leave learners unattended. The very same category of respondents also suggested that union meetings / gatherings should be held by teacher unions if they need to, but after school hours. Some of the remaining respondents (45 percent) based their reasons on the fact that the SEM's , to whom principals report , receive the Education Labour Relations Chamber (ELRC) : KZN deliberations and decisions very late because they have no representation in the provincial chamber while they , as unions , are role players in the provincial chamber meetings. It was therefore on the strength of the stated comment that three union respondents felt that bringing new and relevant chamber information to principals , is indicative of the union's role and support they give to the principals for effective and sound management of the schools.

Sixthly , respondents were asked to comment on the statement : Teacher unions promote discipline and work ethics amongst their school – based members. 55 percent of interviewees **agreed** while 45 percent **disagreed**. Four of the interviewees contributing to a 55 percent majority , even stated during the interview that they , as unions , have a significant role to play in promoting discipline and work ethics amongst teachers in schools , particularly when positively and actively engaged in school matters by principals.

Three union respondents of the remaining 45 percent , commented that teacher unions of different backgrounds within the same school premises usually cause indiscipline and a lack of work

ethics amongst teachers in schools. For example , one union member declared :

The disciplinary problems start once there is more than one teacher union within the same school . For instance , in our school , there is a show of power between SADTU and NATU , and this disturbs our school programme .

Seventhly , respondents were asked to **agree** or **disagree** whether intimidation and militant tactics by teacher unions to school principals bring about effectiveness in the running of schools.

All interviewees (100 percent) **disagreed** with the above statement. All of the union members interviewed , believed intimidation and militant tactics to principals are destructive towards effective and smooth management of schools and further lead school management to anarchy.

Eighthly , the respondents were asked to comment on whether teacher unions should be allowed to address teachers in policy matters as teacher unions are a reliable source of information. The majority of the interviewees (85 percent) **agreed** with the above mentioned statement , while the remaining 15 percent **disagreed**. The respondents who agreed with the statement felt that teacher unions should be incorporated into teams that address policy matters. Two union respondents even indicated that teacher union members are the participants and role players in the ELRC : KZN and have , therefore , reliable information that can assist principals to be informed in terms of educational policy matters and have their schools effectively run. For example , one union member declared :

We are a reliable source of information and we can help principals to be informed with provincial chamber matters ..., but they hate us. Each time there has been a chamber meeting , our branch union officials inform us immediately about all that has been discussed.

It is , from my experience as a DoE middle manager , true that teacher union members have a

reliable information in terms of the provincial chamber deliberations and decisions since unions sit in those meetings ,while the SEM's to whom principals directly report , are not represented in the ELRC : KZN. Teacher unions , in addition , have a quicker mechanism of distributing updated chamber information to their members even before the DoE middle managers are informed about it. How reliable the information will be when it reaches principals , is another matter.

Ninthly , union interviewees were asked to comment on whether the culture of learning and teaching (COLT) can be effective in schools if principals work closely with teacher unions. 92 percent of the union interviewees **agreed** with the statement while eight percent **disagreed**. Most of the respondents commented that a number of principals marginalize teacher union members in promoting COLT in schools whilst there is a lot , as unions , they can offer in assisting the management of the principal. Two union respondents made similar comments that they are teachers before they are union members and they believe teacher unions have a significant role to play in promoting and supporting COLT in schools. One respondent amongst the remaining eight percent who **disagreed** , felt that :

Teacher unions have an agenda that is completely different from that of the school and I feel there is no need for principals to work closely with teacher unions ...
In some of our mass meetings , our union officials told us to disturb principals as possibly as we can and make them have sleepless nights , and I do not like that because that is not good .

The union respondent concluded by stressing that there is no need for principals to work closely with teacher unions because unions have other ulterior motives that might militate against the education as well as the future of the child.

Lastly , respondents were asked to **agree** or **disagree** whether teacher unions have an important role to play towards professional development of teachers. 85 percent **agreed** while the remaining

15 percent **disagreed**. Most of the respondents who **agreed** , believed that there is a significant role teacher unions can also play in developing teachers professionally , with three even remarking that as teacher unions , they also receive extensive workshops , thus equipping them with all the meticulous and updated information to professionally develop their members in schools. In the light of this statement teacher unions , therefore , believed that they can be of great support to principals towards sound school management as well as effective COLT. Two respondents amongst those who **disagreed** , felt professional development of teachers should be the responsibility of the DoE officials as employers and not of the teacher union members. One of the union members who disagreed declared :

I do not view things blindly like some of my union colleagues. The Department of Education as an employer , should develop all teachers professionally for the sake of uniformity and not the unions , ...and that will be a correct thing to do.

4.5. Conclusion

According to the above findings , teacher unions in the study firmly believe that they have a vital role to play in the effective and smooth running of schools. Data from the study also confirms that principals who filled in the questionnaire , do recognize the existence and the role of teacher unions. It is , however , noticeable that principals in the study are not comfortable in sharing their management responsibilities with teacher unions.

The above picture remains a challenge to be fully addressed , particularly because the existing unhealthy tug-of-war between the principals and the teacher unions has been there for decades and people talk about it and how it cripples the smooth running of the schools , but no one is prepared to face it head on for the sake of effective running of schools. Secondly , the said unpleasant situation obtaining between principals and teacher unions in the study might , unfortunately , end up

having a negative bearing on the running of schools if it has to remain unattended.

The analysis and interpretation of data gathered in this chapter , is aimed at providing a broader perspective in terms of the perceptions the key constituents have regarding the role of teacher unions in school management.

The primary aim of chapter five is to analyze and discuss some of the concerns as well as the responses brought to the surface by the key constituents regarding the role of teacher unionism in the management of schools. The secondary aim of the next chapter , is to provide a wider picture of the underlying theme of this small scale study and further present a set of emerging recommendations from the evidence collected.

CHAPTER 5: CONCLUSIONS AND RECOMMENDATIONS

5.1. Introduction

The purpose of the study reported in this dissertation was to investigate school principals' and teacher union members' perceptions of the role of teacher unions in school management. To this effect, 44 principals from Ndwedwe and Maphumulo circuits completed a questionnaire and 20 union members were interviewed. The main focus of chapter four was to present the research data so as to provide a basis on which a strategic management approach for the management of teacher unionism in schools, could be structured. It is the intention of this chapter to briefly provide a summary of the major findings of this research project, analyze and interpret the findings and identify implications of the study findings as well as emerging conclusions and recommendations for an overall strategy that would assist in managing teacher unionism in schools. Discussions and recommendations will further address strategies that seek to assist those principals who encounter problems in managing active teacher unionism in their schools.

5.2. Summary of the Major Study Findings

Responses in the questionnaire indicated that principals in this study recognize the existence and the role of teacher unions in their schools. The above further suggests that some principals are gradually coming to terms and understanding that teacher unions are organizations that are 'here to stay' and that unions should also be acknowledged by the school management. The findings from the study also suggest that union members in the schools felt that some principals do not trust them. There are principals who are **not** comfortable with the involvement of teacher unions in their school management.

Some were further not prepared to compromise their management functions and responsibilities at the hands of teacher unions whom they perceive as negative and destructive towards the effective running of

schools. According to the principals, this gloomy teacher union picture emanates from the unbecoming and unprofessional manner in which some of the union members conduct themselves in schools, thus abusing their union positions. The said unpleasant behaviour by some union members, ends up putting the entire teacher union in an awful position, posing a challenge to teacher unions who have members who still perceive their union membership as a 'forest' to hide in. For example, the majority of the principals were not happy with the view that teacher union site stewards should be invited before management decisions are taken by the principals and their school management teams (SMTs). Union site stewards comprise, in most instances, of inexperienced post level one teachers who have no management exposure. To principals, it is unthinkable that such teachers can advise them on management related matters and further demand to be represented in the management meetings of the school.

This small – scale study also confirms the notoriety of teacher unions in schools and that some principals are fully aware of their departmental roles as well as their answerability and accountability to the DoE and to parents should things go wrong in their schools. It is further the principals' responsibility to ensure that the management of the school is in such a way that the school's performance is in line with the goals or objectives laid down by the role players of the school (Mc Pherson, 1980 : 7).

The majority of the principals **agree** that teacher unions are a source of reliable information since they are fully represented in the ELRC : KZN and have a quicker mechanism of distributing updated information to their members. It is however, noticeable that the majority of principals prefer communicating on updated and reliable information with SEM's and other departmental officials who are in their line function rather than seeking advice and direction from the teacher unions. Principals are fully aware that updated information from the side of the DoE takes a bit longer to reach principals than it takes to reach teacher unions, but they rather prefer to receive that information through the channels

and structures of the DoE. This confirms that there is still a serious lack of mutual trust between some principals and teacher unions. It is also worth mentioning that some teacher unions even criticize the DoE for using the cascade model when disseminating information to principals, mentioning the possible loss of information originality along the way as a reason.

5.3. Implications of the findings of the study

The main clientele, the learner, is unfortunately one vital component that suffers a great deal as a result of the negative atmosphere existing between the principals and the teacher unions. This is because all the repercussions created as a result of the tug-of-war between the principals and teacher unions unfairly spills over to the innocent learners as it affects COLT as well as the entire management of the schools adversely.

It has been my continuous observation as an SEM, that once there is a school matter perceived to be a problem that affects the school – based union members, union officials would visit the principal of the affected school for intervention on behalf of their members. The teacher union officials, who would mostly comprise of teachers from the neighbouring schools, would have to leave their professional tasks as well as their learners behind and that, alone, costs the future of their unattended learners as well as the effective running of their schools dearly.

It is unfortunate that a principal whose management is interfered with by teacher union activities, finds it difficult to have the organisational goals or objectives of the school achieved (Frase and Hetzel, 1990:7). It further impacts negatively on COLT if the school tends to operate both as a union and an educational institution at the same time (Van Schalkwyk, 1986 : 144).

5.4. Strategies for effective management in unionized schools

Firstly, it is worth mentioning that teacher unions are legal and are further recognized by the DoE provincially as well as nationally. It is for that reason that teacher unions are invited as vital role players in forums that mainly impact on their school – based members. It is, therefore, a recommendation to principals that for the smooth running of schools, they need to work in close collaboration with teacher unions. It should, however, be emphasized that this is no suggestion that principals have to surrender the running of their schools to teacher unions. Once teacher unions are correctly engaged in school programmes, they can be of assistance to the principal to have his/her school run effectively and smoothly. For example, teacher unions receive updated information from the ELRC: KZN even earlier than the DoE middle managers, to whom the principals directly report, most probably because teacher unions are active participants in Chamber meetings and have a quicker mechanism of disseminating information that might be useful and beneficial towards the effective execution of COLT in schools. It is, however, unfortunate that adverse relationships commonly obtaining between teacher unions and principals in some schools of study, tend to impact negatively on COLT. Recognition of teacher unions by principals may help to minimize the unpleasantness and anarchy usually created through, “we” versus “him / her” syndrome in schools and between the teacher unions and the principals. Firstly, both the provincial as well as the National Department of Education (NDoE) recognize teacher unions as lawful organizations operating in education as well as in schools. Secondly, principals have to understand that it is a human right of teachers to belong to a teacher union of their choice (South African Constitution, Act. No. 108 of 1996 : section 223 ; Maile, 1999 : 3).

Professional unionism, which emphasizes joint operation between teacher unions and the school management, is likely to solve the said problems in schools (Heystek and Lethoko, 2001:224). So, strategies need to be developed to enable school management and school – based teacher union members

to work together for the smooth running of schools.

Secondly , in my experience as both a principal and a DoE middle manager , the principals' ignorance in terms of departmental policies as well as the current legislation in education , creates vulnerability and openness to union onslaught and manipulation impacting negatively on COLT. The principals' daily interaction with union site stewards demands the principal to be knowledgeable and conversant with the relevant legislation in education. Once teacher unions discover in their interaction with the principal , that his / her school management lacks knowledge of the mentioned areas , they tend to capitalize on that and further take an advantage of his / her ignorance for their own benefit , as a union. It is , therefore , my recommendation that principals should read and familiarize themselves with departmentally distributed ELRC agreements , Human Resource Management (HRM) documents as well as other relevant policies of the DoE in order to defend their stand and that of the DoE to whatever might militate against effective COLT in schools.

Thirdly , unfairness and inconsistencies by some principals in the implementation of departmental policies and procedures to teachers , are some of the main focus areas of teacher unions in protecting their members from principals whom teacher unions perceive as manipulative and authoritative in their management. Lack of consistency in the principal's implementation of the DoE policies , might end up being a fertile ground for a union – driven anarchy and mayhem that might adversely affect COLT in schools. It is , therefore , recommended that principals remain professional and unbiased when implementing DoE policies and procedures to teachers , thus minimizing incidents that might militate against the effective running of schools.

5.5. General recommendations

The intention of the following recommendations is not to present a magic formula for success in schools ,

but it is to move principals and teacher unions a little closer to each other towards improving and sustaining COLT as well as the effective running of schools. Some of these recommendations are :

Firstly , it is highly suggested that principals and their school management teams (SMTs) , are intensively trained and fully developed by DoE towards understanding and accepting the legitimacy and authenticity of teacher unions in schools. Secondly , it is my observation that some of the union – related problems that currently face principals , emanate from the negative attitude that some of the principals have towards unions , hence finding it extremely difficult to accept that they have to recognize and accept teacher unions in their schools. It is further recommended that the principals are apprised on their role as school managers as well as on the role teacher unions have to play in schools , and how they can amicably both work together with teacher unions and still remain in control of their schools. This is one area where a number of principals , observably , are caught napping by teacher unions where teacher unions would capitalize on the fact that principals are not aware of their perimeters within which they have to operate as managers.

The majority of principals are , in my observation , vulnerable because they were , at no stage , inducted when they were appointed as principals. They , as a result , would operate on a trial and error basis in terms of effective running of schools , thus opening a loop hole for the teacher unions to interfere with their smooth of the schools. A number of new principals , in particular , would eventually learn to understand what their positions entail after they have committed a lot of management blunders in their schools. It is , therefore , my recommendation that the DoE designs a structured induction programme that will equip and show particularly new principals a direction , that will end up giving them an operational insight regarding their principalship positions. Principals are front-line ‘ fire fighters ’ as well as the ‘ face ’ of the DoE. This actually demands of them to be conversant with the various legislative mandates that affect their schools. Their positions further demand that they should be knowledgeable and

be up-to-date with the ELRC: KZN resolutions and other matters that , in most cases , affect teachers and their schools.

In order , therefore , to avoid or minimize the level of friction between principals and teacher unions particularly over issues that were agreed upon in the provincial chamber , it is my proposal to the DoE that principals and SEM's are also represented in the ELRC: KZN so that there is no vital component that will lack knowledge in terms of provincial chamber matters as well as resolutions reached particularly those that might impact on schools. The proposed representation will also allow the SEM's to proactively play their supportive role to the principals in an event of friction between the principals and teacher unions.

It is also my recommendation to the DoE that teaching , like nursing and other professions , be declared as an essential service. It is strongly believed that once teaching is officially accorded the said status, the high levels of the notorious industrial action that has already proved to have a negative impact on the entire running of schools, can be greatly reduced. According to Heystek and Lethoko (2001: 227) , once teaching has been declared an essential service , it will be of paramount importance that principals and teacher unions work in close collaboration and further make joint endeavours to meet one other halfway where they tend to disagree. The proposed relationship between principals and teacher unions can , undoubtedly , help to reduce the rate of teacher union strikes which tend to take a lot of learners' time. The above proposal can further help to bring back that lost good image and pride the teaching profession once had.

5.6. Conclusion

This has been a small – scale study of selected sample of principals and teacher union members regarding their perceptions of the role of teacher unions in school management. The results of the study, because of

the small sample , cannot be generalized to the whole province or even to iLembe District : KZN.

However , important lessons regarding the principals' perceptions of the role of teacher unions in school management , can be learnt and applied to intervene in similar settings and situations in schools elsewhere. Thus , further research into the principals' perceptions of the role of teacher unions in school management is needed to fully understand the role of teacher unions in school management.

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APPENDIX A

QUESTIONNAIRE

INSTRUCTIONS FOR QUESTIONNAIRE

- Use a BLACK or BLUE ink pen. Please do not use a pencil.
- Mark multiple choice fields as follows :

Shade circles like this = ●

Not like this = ○

- In the interest of confidentiality , you are not required to supply your name to this questionnaire.
However , a few personal and professional details will be most useful to the research
- Please try as much possibly as you can to give your frank and objective answers to each question on this questionnaire.
- If you run out of space , you can add extra paper(s) .

A. BIOGRAPHICAL INFORMATION

1. Your gender is :

Female

Male

2. Your racial group is :

Asian

African

Coloured

White

3. Your formal qualification is :
- Below M+ 3 M + 3 M=4 M + 5 and above
4. Your age in completed years :
- 20 – 25 26 – 35 36 – 45 46 – 55 55 – 65 65 and above.
5. Number of completed years as a school principal / acting principal :
- 0 – 5 6 – 10 11 – 20 More that two years
6. Number of completed years as a school principal / principal at this particular school :
- 0 – 5 6 – 10 11 – 20 More than 20 years
7. Your teacher union affiliation :
- SADTU NATU APEK SAOU Other (Specify).....

B. DEMOGRAPHIC INFORMATION

8. Number of teachers in your school :
- 2 – 10 11 – 19 20 – 28 29 – 39 40 and over
9. Number of learners in your school :
- 40 – 150 151 – 200 201 – 300 301 – 600 601 – 900
- 901 – 1200 1200 and above

10. Type of school :

- Junior Primary Senior Primary Secondary School Combined School
 Other (Specify)

11. Your school is situated in a / on a :

- City Semi – city Town Rural area

C. MANAGEMENT TASKS OF THE SCHOOL PRINCIPAL

12. Teacher unions have a role to play towards effective professional development of teachers.

- Agree Strongly agree Disagree Strongly disagree
 Uncertain

13. Union site stewards in schools should be invited before management decisions are taken by school principals.

- Agree Strongly Agree Disagree Strongly Disagree Uncertain

14. Teacher unions contribute meaningfully towards effecting discipline among their own members.

- Agree Strongly Agree Disagree Strongly disagree Uncertain

15. The principal's style of management should accommodate the beliefs and convictions of the majority teacher union within the school.

- Agree Strongly Agree Disagree Strongly Disagree Uncertain

16. Effective involvement of teacher unions promote sound communication within the school .

- Agree Strongly Agree Disagree Strongly Disagree Uncertain

17. How is the role of teacher unions in promoting professional ethics in your school ?

- Excellent Very Good Good Average Poor Very Poor
 Uncertain

18. School principals should be equal partners with teacher unions towards effecting the culture of teaching and learning in schools.

- Agree Strongly Agree Disagree Strongly Disagree Uncertain

19. Industrial actions by teacher unions during school hours actually benefit the learners eventually.

- Agree Strongly Agree Disagree Strongly Disagree Uncertain

20. RANK the FIVE most relevant and important persons you would approach in an event of a disciplinary problem in your school , 1 being the highest and 5 the lowest.

- Superintendent of Education (M) SGB Chairperson Union official
Principal colleague SMT members Other (Specify).....

21. As a school principal , I prefer to be advised by the following on departmental policy matters:

- Superintendent of Education (M) Union officials Other principals
 Other (Specify).....

22. A school principal who regularly attends union – related meetings / gatherings during school hours , is likely to bring more information and skills to the teachers.

- Agree Strongly Agree Disagree Strongly disagree Uncertain

23 . Do you think that school principals should promote and protect the interests and policies of their own

teacher unions in their style of management ?

- Yes No

24 . Teacher unions are a source of reliable information to school principals.

- Agree Strongly Agree Disagree Strongly Disagree Uncertain

25. Teacher unionism has a positive on maintaining harmonious working relations between the management and the teachers.

- Agree Strongly Agree Disagree Strongly Disagree Uncertain

26. In my school , school parents do accept and accommodate the participation of teachers in industrial action during school hours.

- Never Sometimes Often Almost Always

27. Teacher unionism contributes positively towards the achievement of the desired outcomes in schools.

- Agree Strongly Agree Disagree Strongly Disagree Uncertain

28. OTHER COMMENTS:

.....
.....
.....
.....

THANK YOU FOR YOUR SUPPORT

APPENDIX B

The Department of Education and Culture
P/ Bag X 532
NDWEDWE
4342
07 February 2003

ATTENTION : MR. A .G . MTHEMBU

The Circuit Manager
The Department of Education and Culture
P/Bag X 532
NDWEDWE
4342

Dear Sir

I am currently engaged in an academic research with the University of Natal : DURBAN towards an M. Ed. degree , titled , “ **PRINCIPALS’ PERCEPTIONS OF THE ROLE OF TEACHER UNIONS IN THE EFFECTIVE MANAGEMENT OF SCHOOLS IN THE NDWEDWE AND MAPHUMULO CIRCUITS , KWAZULU - NATAL .** ”

Structured questionnaires will be distributed to thirty (30) randomly selected principals per circuit , under the auspices of my colleagues in management from Ndwedwe and Maphumulo circuits.

Semi – structured interviews will also be conducted to selected SADTU and NATU teachers (PL. 1’s) within the two selected circuits and arrangements with the relevant teachers’ unions have been made.

Find , attached hereto , a letter from the regional office that grants me permission to pursue with the said study.

Yours Faithfully
O.T. Sikhosana

APPENDIX C

The Department of Education and Culture
P/ Bag X 532
NDWEDWE
4342
7 February 2003

ATTENTION : Mr. N.W. MZONELI

The Circuit Manager
The Department of Education and Culture
P/ Bag X 9217
MAPHUMULO
4470

Dear Sir

I am currently engaged in an academic research with the University of Natal : DURBAN towards an M. Ed. degree , titled , “ **PRINCIPALS’ PERCEPTIONS OF THE ROLE OF TEACHER UNIONS IN THE EFFECTIVE MANAGEMENT OF SCHOOLS IN THE NDWEDWE AND MAPHUMULO CIRCUITS , KWAZULU – NATAL .** ”

Structured questionnaire will be distributed to thirty (30) randomly selected school principals per circuit , under the auspices of my colleagues in management from Ndwedwe as well as Maphumulo circuits. Semi – structured interviews will also be conducted to selected SADTU and NATU teachers (PL.1’s) within the two selected circuits and arrangements with the relevant teachers’ unions have been made.

Find , attached hereto , a letter from the regional office granting me permission to pursue with the said study.

Your co – operation will be appreciated.

Yours Faithfully
O.T. Sikhosana

APPENDIX D.

INTERVIEW QUESTIONS – TEACHER UNIONS

BIOGRAPHICAL INFORMATION

1. You gender is:

Female

Male

2. Your racial group:

Asian

Black

Coloured

White

3. Your formal qualification is:

Below M+3

M+ 3

M+ 4

M + 5 and above.

4. Your age in completed years :

20 – 25

26 – 35

36 – 45

46 - 55

55 – 65.

5. Number of completed years as a teacher :

0 – 5

6 – 10

11 – 20

More than 20 years.

6. Number of years as a teacher at your present school:

0 – 5

6 – 10

11 – 20

More than 20 years.

7. Your teacher union affiliation :

APEK

NATU

SADTU

1. Union site stewards should be invited by the school management before any management decisions are made. Do you agree ? If not , why ?
2. Teacher unions play an effective role in bringing about unity and harmony within the school. Do you agree ? If not , why ?
3. Teacher union members should be allowed to participate in industrial action during school hours since the results achieved , thereafter , benefit the child in class. Do you agree ? If not , why ?
4. School principals should work closely with teacher unions as equal partners in management for effective teaching and learning. Do you agree with this statement ? If not , why ?
5. Attending union related meetings / gatherings during school hours should be encouraged by school principals since schools benefit from the information gathered from such meetings / gatherings.
6. Teacher unions promote discipline and work ethics amongst their school based members. Do you agree ? If not , why ?
7. Intimidation and militant tactics by teacher unions to school principals bring about effectiveness in the running of schools. Do you agree ? If not , why ?
8. Teacher unions should be allowed to address teachers on policy matters as teacher unions are a reliable source of information. Do you agree ? If not , why ?

9. The culture of teaching and learning (COLT) can be effective in schools if school principals can work closely with teacher unions. Do you agree ? If not , why ?

10. Teacher unions have an important role to play towards professional development of teachers. Do you agree ? If not , why ?

11. What other roles do you think teacher unions are not given an opportunity to play as vital role players in education ?

APPENDIX E .

The Department of Education and Culture
P/ Bag x 532
NDWEDWE
4342
7 February 2003

ATTENTION : Ms. P.T. LUTHULI

The Branch Secretary
NATU
NDWEDWE
4342

Dear Madam

I am currently engaged in an academic study with the University of Natal : DURBAN titled ,
**“ PRINCIPALS’ PERCEPTIONS OF THE ROLE OF TEACHER UNIONS IN THE EFFECTIVE
MANAGEMENT OF SCHOOLS IN THE NDWEDWE AND MAPHUMULO CIRCUITS ,
KWAZULU - NATAL . ”**

My study will , amongst other things , focus to selected NATU as well as SADTU teachers (PL. 1’s)
from both Maphumulo and Ndwedwe. I wish to give you all the assurance that the information gathered
through the semi – structured interviews , will be treated in strictest confidence and all the human and
constitutional rights will be observed during the said exercise.

May I , therefore , humbly request your office to supply me with the list of TEN teachers (PL1’s) per
circuit , who are union members from the circuit stated above , as well as the school where the teacher
works. The mentioned list of teachers will further assist to verify to teachers selected , that permission has
been sought and granted to have them interviewed. Find , attached hereto , a letter from the Department of
Education and Culture granting me permission to conduct the proposed research.

Your co- operation will be appreciated.

Yours Faithfully
O.T. Sikhosana

APPENDIX F .

The Department of Education and Culture
P/ Bag X 532
NDWEDWE
4342
07 February 2003

ATTENTION : Mr. M. NTOMBELA

The Regional Secretary
SADTU
NORTH DURBAN REGION

Dear Sir

I am currently engaged in an academic research with the University of Natal : DURBAN titled ,
**“ PRINCIPALS’ PERCEPTIONS OF THE ROLE OF TEACHER UNIONS IN THE EFFECTIVE
MANAGEMENT OF SCHOOLS IN THE NDWEDWE AND MAPHUMULO CIRCUITS ,
KWAZULU – NATAL . ”**

My study will ,among other things , focus to selected SADTU as well as NATU teachers (PL.1’s) from both Maphumulo and Ndwedwe circuits . I wish to give you all the assurance that the information gathered through semi – structured interviews from your members , will be treated in strictest confidence and all the human and constitutional rights will be observed during the said exercise.

May I , therefore , humbly request your office to supply me with the list of TEN (10) teachers (PL.1’s) per circuit , who are your union members from the circuits mentioned above as well as the school where the teacher works.

The mentioned list of teachers will further assist to verify to teachers selected that permission has been sought and granted to have them interviewed. Find , attached hereto , a letter from the Department of Education and Culture granting me permission to conduct the proposed research.

Your co- operation will be appreciated.

Yours faithfully
O.T. Sikhosana

APPENDIX G.

The Department of Education and Culture
P/Bag X 532
NDWEDWE
4342
20 December 2002

The Acting Regional Manager

ATTENTION : Dr. G.N. Msimango
Department of Education and Culture
Education Management Services
ETHEKWINI REGION

Dear Sir

REQUEST FOR PERMISSION TO CONDUCT A RESEARCH

I am currently conducting a research project aimed at examining the , “ **PRINCIPALS’ PERCEPTIONS OF THE ROLE OF TEACHER UNIONS IN THE EFFECTIVE MANAGEMENT OF SCHOOLS IN THE NDWEDWE AND MAPHUMULO CIRCUITS, KWAZULU - NATAL .**” The said research is towards an M.Ed. degree and is being carried out under the supervision of Dr. R. Moletsane of the University of Natal : DURBAN.

Structured questionnaire , for the purpose of the research , will be developed and administered to randomly selected school principals from Ndwedwe and Maphumulo circuits. Questionnaires will be delivered and collected personally by the researcher.

May , I , in conclusion , request for your permission to distribute questionnaire to the said school principals during the months of January / February 2003. I wish to assure you , sir , that every effort possible will be made to minimize any interference with the normal functioning of schools during the requested period.

Yours Faithfully
O.T. Sikhosana



PROVINCE OF KWAZULU-NATAL
ISIFUNDAZWE SAKWAZULU-NATAL
PROVINSIE KWAZULU-NATAL



DEPARTMENT OF EDUCATION AND CULTURE
UMNYANGO WEMFUNDO NAMASIKO
DEPARTEMENT VAN ONDERWYS EN KULTUUR

NORTH DURBAN REGION

ISIFUNDAZWE SENYAKATHO NETHIKU

NOORD DURBAN STREEK

Address:	Truro House	Private Bag:	Private Bag X54323	Telephone:	(031) 360-6265
Ikhele:	17 Victoria Embankment	Isikhwama Seposi:	Durban	Ucingo:	(Exams Help Desk)
Adres:	Esplanade	Privaatsak:	4000	Telefoon:	
				Fax:	(031) 332-1126
Enquiries:	Mr SP Govender	Reference:	2/12/2/3	Date:	28 January 2003
Imibuzo:	360-6247	Inkomba:		Usuku:	
Navrae:		Verwysing:		Datum:	
	sureng@kznedu.kzntl.gov.za				

Dear Mr Sikhosana

PERMISSION TO CONDUCT RESEARCH : NORTH DURBAN REGION

1. Your letter dated 20 December 2002 refers.
2. You are hereby granted permission to conduct research along the lines of your proposal, subject to the following conditions:
 - a. No school/person may be forced to participate in your study;
 - b. Access to the schools you wish to utilise is negotiated with the principals concerned by yourself;
 - c. The normal teaching and learning programme of the schools is not to be disrupted;
 - d. The confidentiality of the participants is respected; and
 - e. A copy of the findings should be lodged with the Regional Senior Manager on completion of the studies.
 - f. You accept that as a serving educator in the employ of the KZNDEC, you may not utilise official time to conduct research.
3. This letter may be used to gain access to schools.
4. May I take this opportunity to wish you every success in your research.

Yours faithfully,

Mr SP Govender
Regional Co-ordinator: Research
for Regional Senior Manager